



Ministry of
Children and Family
Development

Community and Residential Information System - *CARIS*

**User Manual – PSDHH
April 2010**

Table of Contents

1 General Information and Procedures.....	1
1.1 How to use this manual.....	1
1.2 The CARIS System.....	2
1.3 What CARIS does.....	2
1.4 Security and Privacy.....	3
1.5 Basic Procedures.....	4
1.5.1 Logging In.....	4
1.5.2 Your Screen Display.....	7
1.5.4 Context Bar.....	7
1.5.5 Navigation Tree	7
1.5.6 Main Information Area	7
1.5.7 Interface Title.....	7
1.5.8 Search and Advanced Search.....	7
1.5.9 Help	8
1.5.10 Main	8
1.5.11 Activities.....	9
1.5.12 My Cases.....	10
1.6 Client Context.....	10
1.6.1 Cases.....	11
1.6.2 Details.....	11
1.6.3 Relationships	12
1.6.4 Address Book	13
1.6.5 Close.....	13
1.7 Case Context.....	13
1.7.1 Summary	14
1.7.2 Participants.....	14
1.7.3 Case Plan	14
1.7.4 Activities.....	15
1.7.5 Close.....	15
1.8 Searching for a Client, Contact, Member or Organization.....	16
1.8.1 Basic Search	16
1.8.2 Advanced Search	17
1.9 Help.....	19
1.10 System Error.....	19
2 Client and Case Management.....	20
2.1 Creating a new client.....	20
2.2 Finding an existing client.....	21
2.3 Editing an existing Client.....	23
2.4 Creating a new contact.....	24
2.5 Finding an existing contact.....	25
2.6 Editing an existing contact.....	27
2.7 Finding a member.....	28
2.8 Creating a new organization.....	29
2.9 Finding an existing organization.....	31
2.10 Editing an existing organization.....	33
2.11 Creating a new Relationship.....	34
2.12 Finding an existing relationship.....	36
2.13 Editing an existing relationship.....	36
2.14 Creating an Affiliate.....	37
2.15 Removing an Affiliate or a Member.....	39
2.16 Creating a New Case (Referral).....	40
2.17 Discharging a Client.....	42
2.18 Closing a Case.....	44

2.19	Finding an existing case.....	45
2.20	Admitting a Client.....	46
2.21	Adding a Member to a Case.....	47
2.22	Developing a CASE Plan.....	49
2.22.1	Creating a Goal	49
2.22.2	Creating an Objective	50
2.22.3	Creating an Action	51
2.23	Generating the Case History.....	53
3	Functions.....	54
3.1	Eligibility List Management.....	54
3.1.1	Adding a new Eligibility List	54
3.1.2	Editing an Eligibility List.....	56
3.1.3	Deleting an Eligibility List.....	56
3.1.4	Completing an Eligibility List.....	56
3.1.5	Eligibility List Summary.....	57
3.1.6	Adding a Participant to an Eligibility List.....	58
3.2	REPORTS.....	60
3.2.1	Ad Hoc Reports	60
3.2.2	Creating a Case Report.....	61
3.3	ORGANIZATION NOTES (Also referred to as "Facility Notes").....	62
3.3.1	Creating an Announcement.....	63
3.3.2	Deleting an Announcement	64
3.3.3	Logging a Communication Note	64
3.3.4	Logging Telephone calls, Faxes, e-mails.	65
3.3.5	Recording a Safety Event (Fire, Smoke, Test).....	69
3.3.6	Logging a Topic Based Consultation.....	70
3.4	CASE NOTES.....	71
3.4.1	Attaching a File.....	71
3.4.2	Detaching a File.....	73
3.4.3	Logging a Client Based Consultation	73
3.4.4	Logging Client Correspondence.....	75
3.4.5	Generating Progress Notes	77
3.4.6	Logging Health Visits.....	78
3.4.7	Making Referral Observations	79
3.4.8	Recording Session Notes	80
3.4.9	Presenting Issues	82
3.5	Alerts.....	83
3.5.1	Creating a General Alert.....	83
3.5.2	Creating a Supervision Alert.....	84
3.6	CASE FORMS.....	86
3.6.1	Recording the Admission Interview	86
3.6.2	Budget Notes.....	87
3.6.3	Generating the Care Plan Checklist.....	88
3.6.4	Creating the Independent Living Assessment (ILS)	90
3.6.5	Logging Medications.....	92
3.6.6	Recording Administration of Medication	94
3.6.7	Deleting a Medication Administration Record	95
3.6.8	Discontinuing a Medication.....	96
3.6.9	Changing a Medication	97
3.6.10	The OTC Checklist	98
4	Agency Specific Functions.....	100
4.1	Performance Quality Improvement (PQI) audit.....	100
4.1.1	Creating a PQI Session	100
4.1.2	Reviewing Files (Begin the session).....	108
4.1.3	Closing the PQI Session.....	107
4.2	Bed Administration.....	108
4.2.1	Adding a Unit	109

4.2.2	Adding a Room to a Unit	110
4.2.3	Adding a Bed to a Room	111
4.2.4	Bed Management	112
4.2.5	Reserving a Bed	114
4.2.6	Assigning a Bed.....	116
4.2.7	Occupancy.....	117
5	Training Plan and Scenarios.....	118
5.1	General Information and Getting Ready.....	118
5.2	Using CARIS.....	119
5.3	Scenarios.....	119
5.4	Evaluations.....	124
5.4.1	Training Course Evaluation	124
5.4.2	Self Evaluation.....	124
5.4.3	Understanding The CARIS System.....	125
5.5	Notes.....	130
6	Glossary.....	133
7	Index.....	135

CARIS (Community and Residential Information System) is a case management application developed for the Provincial Services Division of the Ministry of Children and Family Development, British Columbia, Canada. The development of this new information management tool enables the accurate and appropriate tracking of clients, services and outcomes and helps to ensure accountability. CARIS provides a new information management tool for CYMHS, the Maples, Youth Forensic Psychiatric Services and Provincial Services for the Deaf and Hard of Hearing.

CARIS is the result of a desire on the part of the Ministry to enhance service delivery by providing open and transparent relationships, improving accountability and facilitating case planning.

The following goals underlie the development of the CARIS system.

Enable communities to develop and deliver services within a consolidated, coherent, community-based service delivery system.

Provide a consistent means for community service providers, including ministry clinicians and workers, to develop and communicate case plans for shared clients.

Support common goals and outcomes, facilitating business process analyses to effect improvements in treatment and care.

Enhance integrated case planning and support community and family capacity to care for children.

Provide a community-based service delivery system that promotes innovation and shared responsibility.

Enhance a community-based approach to service delivery.

CARIS is distributed as a real-time on-line application and its underlying data model is built on the Public Health Conceptual Data Model from the Centers for Disease Control in Atlanta, Georgia and HL7 standards.

1.1 HOW TO USE THIS MANUAL.

This Manual is divided into seven sections:

Section 1. General Information and Procedures

Provides a general overview of the system, what it does, and a discussion on security and privacy. It then provides detailed procedures for performing the common actions such as logging in, working with “context” and so on.

Section 2. Client and Case Management

Provides step by step instructions for performing the daily client/case management operations.

Section 3. Functions

Provides a description and methods of use of specific functions such as alerts, notes, files & documents, referrals, forms, reports and so on.

Section 4. Agency Specific Functions

Descriptions of functions which are specific to a particular agency.

Section 5. Training Plan and Scenarios

Provides training scenarios and self-evaluation charts.

Section 6. Glossary

Provides a glossary of terms used in this manual.

Section 7. Index

Each section contains descriptive text, usually a screenshot of what you may expect to see when you perform an action, and action commands to perform the operation. The commands are in the form of numbered text, i.e.

- 1) Click on "OK".
- 2) Fill in the text box.
- 3) Click on "close".

Note that the screenshots shown may differ slightly from the ones you actually see due to the sample names, agencies or descriptions we have used for demonstration purposes. System updates may also require modifying the screen display.

Section 2 describes processes – how to accomplish certain things like "Start a New Case" or "Create a New Client", while Section 3 describes the Functions - what things do and how to do them, like "Alerts", "Notes" or "Attach a Document".

Warning dialogue boxes will appear to query whether you really want to perform an action, or if you are performing an incorrect action. If you get a browser error notice (Page cannot be Displayed), click the "refresh" icon in your browser toolbar to clear it and return to the Main page.

1.2 THE CARIS SYSTEM

CARIS is a clinically useful and comprehensive case management system enabling clinical teams to work collaboratively on a client's case and to maintain a longitudinal case history of all activities of client service. This practice creates efficiencies in service, enables decision support and provides an auditable record of all activities associated with a client. It assists in providing the right information to the right person at the right time to make the right decision.

CARIS provides on-line assessments, bed management, observations, activities tracking, alerts, waitlists and more and as such is a clinically useful tool.

1.3 WHAT CARIS DOES

CARIS is an on-line secure daily management tool for clinical teams and administrators to assist them in managing their numerous case files.

The following list identifies some of the capabilities and functions of CARIS:

Create new cases
Add members to cases
Add affiliates to cases
Bed management functions

Create
Name
Reserve
Add a Room or Bed
Assign a Bed
Track activities concerning a case
Perform a variety of assessments
Track outcomes
Create notes
Access a detailed client record and summary
Generate reports that help identify trends and issues
Generate case reports
Maintain eligibility and wait lists

1.4 SECURITY AND PRIVACY

Security and Privacy are essential in the proper care of client information. Security and privacy are different, though complementary, elements and need to be differentiated.

Security is a matter of doing many small things properly including developing and following policies, regulations, and procedures and appropriately handling paper and passwords. Security also involves securing the hardware network, the database and the transactions online.

Security for CARIS is the responsibility of the Province of B.C. and is handled by standard government security protocols at CITS (Common Information Technology Services), who are the “hosts” for the CARIS application.

Security is also the responsibility of the users. Every user of the system is responsible for maintaining the confidentiality of their ID and password, and to prevent unauthorized access by locking down their workstation when they leave it unattended.

The CARIS application resides within the SpanBC network behind the government firewall. Users will access CARIS through IDIR or BCeID authentication. While CARIS is an internet-based web application, security is protected by making it accessible only by authorized users with the correct name, password and domain information.

Privacy is a different matter. Privacy relates to the relationship a client and the clinician have to the client’s data. Privacy specifically relates to data and the management and access of that data in the course of clinical care by authorized users.

CARIS provides tightly controlled case-based privacy which enables a case manager to determine who is able to view and contribute to a client’s case.

CARIS handles privacy in a number of ways including the provision of a complete audit trail which enables the review of all accesses, activities and interactions on a client’s case. CARIS’ ability to share data across program and “office” boundaries is controlled by the policies for data sharing of each organization.

Forms in CARIS are not documents that can be e-mailed; but are centralized and accessed remotely by authorized individuals on an as-needed basis. All accesses, changes and views of the client forms are recorded and auditable.

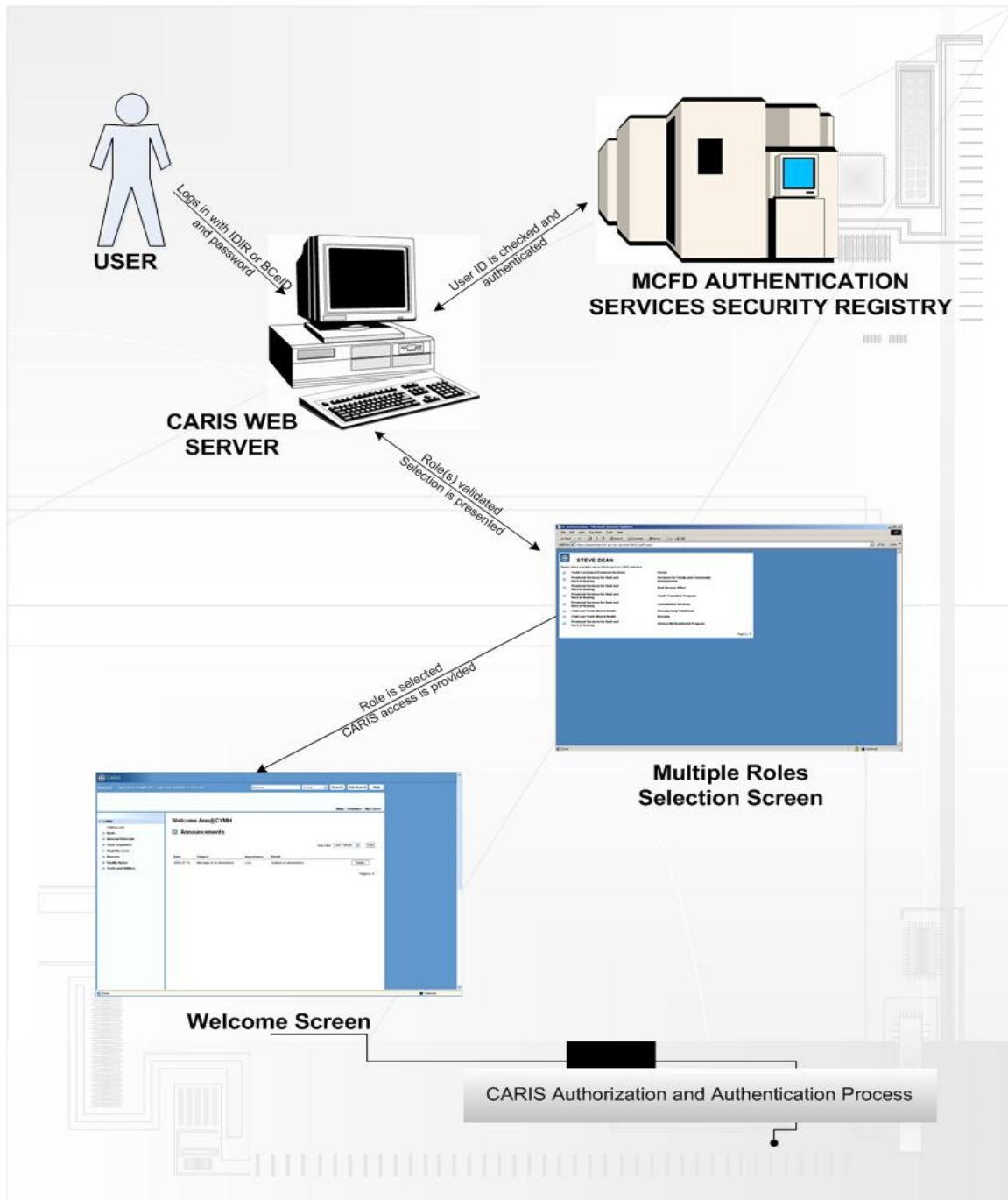
CARIS’ ability to share data across program and “office” boundaries is controlled by the policies for data sharing of each organization.

1.5 BASIC PROCEDURES

1.5.1 LOGGING IN

Authentication and Authorization Process

Access to CARIS is limited to persons who have a valid BCellD or IDIR account, and have been provided with specific roles within CARIS. The authorization for access and the role descriptions are provided to CARIS by MCFD. The User must also have a valid password specifically for CARIS access. The process is shown in the following diagram.



For a User to gain access to CARIS:

Either:

Type in the URL for the CARIS website in the User's web browser,

<http://caris.mcf.gov.bc.ca>

or

Click on the Icon on the User's desktop

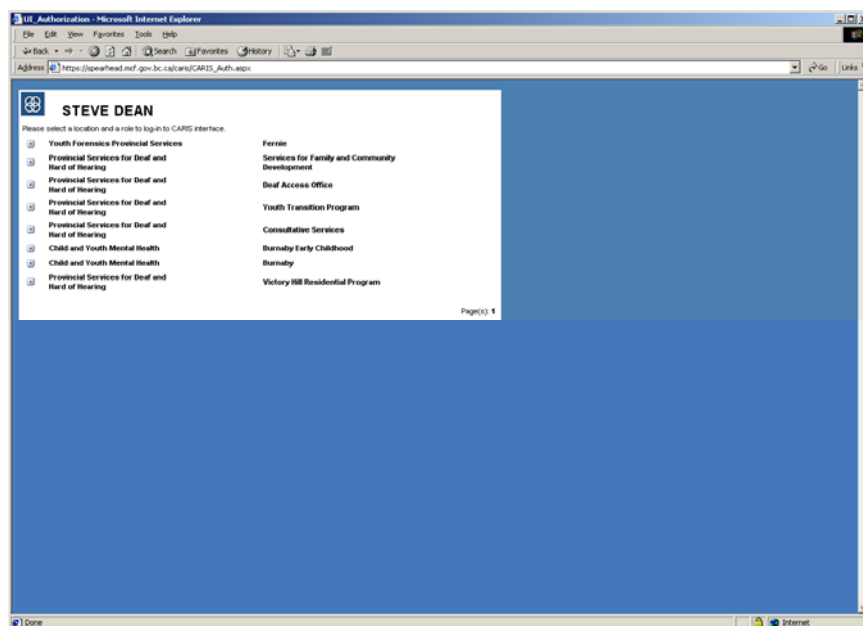


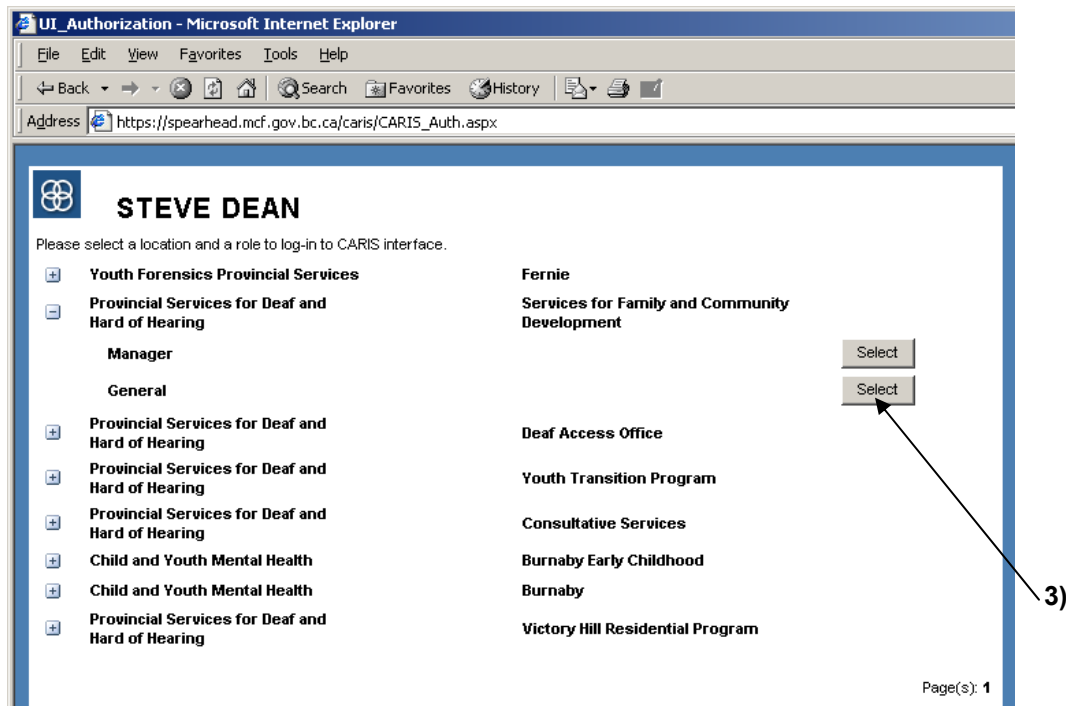
A User ID/Password request will display.

A Windows-style dialog box titled "Connect to app01.logiclynx.com". It features a key icon in the top left. The main area contains a "User name:" label followed by a dropdown menu showing "logiclynx\cymh_ann", a "Password:" label followed by a masked password field (dots), and a checked checkbox labeled "Remember my password". At the bottom are "OK" and "Cancel" buttons.

When you type in your IDIR or BCeID number and your password, the CARIS server contacts the MCFD Authentication Services Security Registry which checks and validates your ID and Password. If both are correct, the Registry confirms that you have access privileges.

CARIS then matches your ID with your preauthorized role(s) and displays the Role Selection page. You can expand any of the roles to display more information, and to select your option.





Choose your option and:

Click “Select”

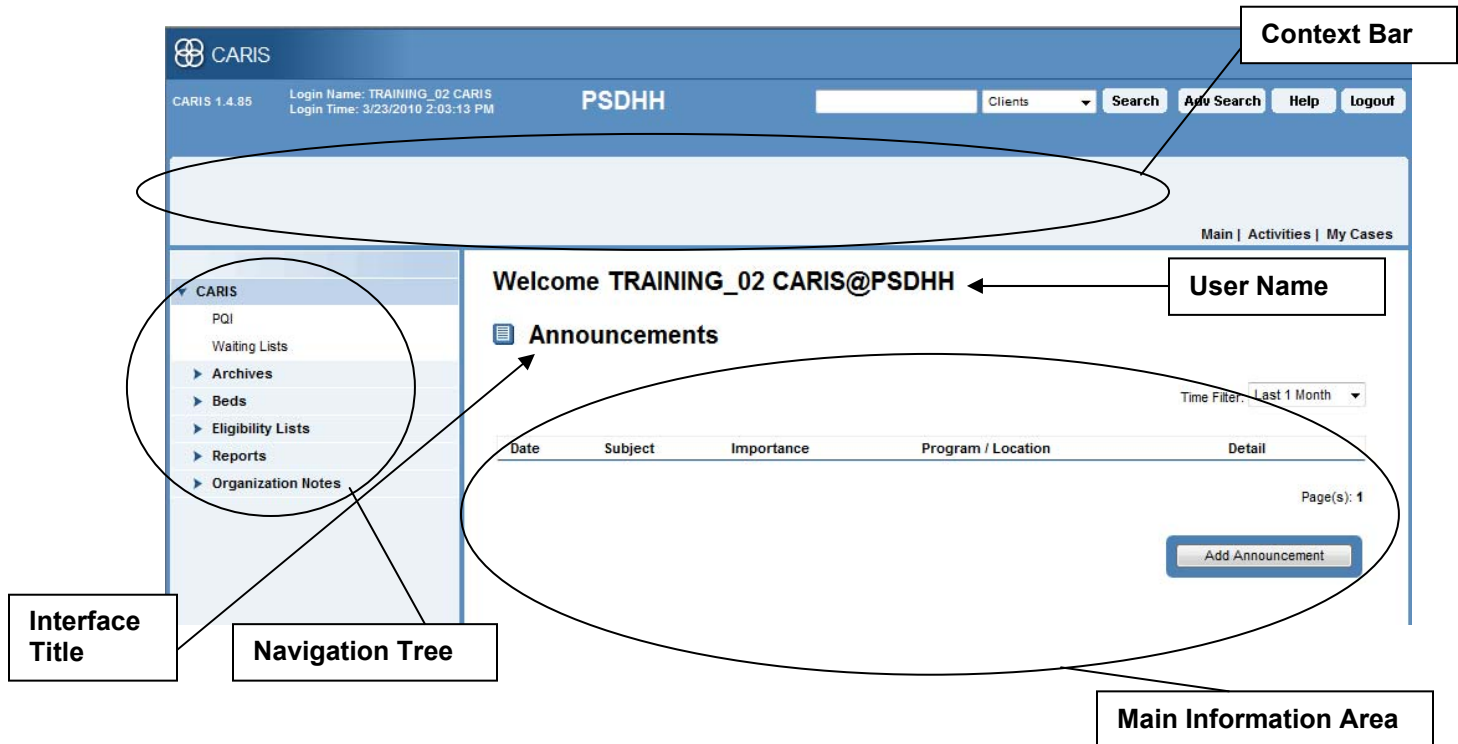
Your Main page will display and you can now use the system.

NOTE: Your screen display may include the browser functions unless you have closed them. **DO NOT USE** the browser functions to navigate through CARIS, particularly the “Back” or “Forward” buttons. They will not work properly since they are browser functions, not CARIS functions. Always use the navigation aids and functions displayed on the CARIS display to navigate the system.

For example, instead of the “Back” Button on your browser, clicking “Cancel” on your open window will take you back to the previous window and cancel any data input or operation you were performing in the open window.

1.5.2 YOUR SCREEN DISPLAY

When you log on to CARIS, you will see your personal desktop. It will show your User Name. You will only be able to access your own cases, information and activities. The system does this automatically for security and privacy reasons. You will be able to search the entire database for persons, but will only be able to view and edit their Client Details.



1.5.3 CONTEXT BAR

The Context Bar is the area where the Client Name and (if he/she has one) the Case Description will display. This is important, and is described in more detail below.

1.5.4 NAVIGATION TREE

The expandable list of functions that can be performed using CARIS. These functions change based on user and the context. I.e., case context, client context, systems context. More on context below.

1.5.5 MAIN INFORMATION AREA

This is where all the information, tables, windows and data display.

1.5.6 INTERFACE TITLE

Indicates what function or area in the system you are presently accessing.

1.5.7 SEARCH AND ADVANCED SEARCH

These functions provide you with the capability of finding persons or organizations already in the database. (Section 1.8)

1.5.8 HELP

The Help file will take you to a pdf version of the User Manual.

1.5.9 MAIN

Clicking on this item will bring you back to your main, or home, page. The Main page is your personal CARIS desktop.

1.1.1

CONTEXT

Context is **an important concept** to understand while using CARIS. Context defines where in the system you are, i.e., context defines what functions are available to use and whether you are able to add/view information to a case, a client or provide notifications system wide. System functions become available or not depending on what context you are in.

There are three contexts:

CARIS (system)
Client
Case

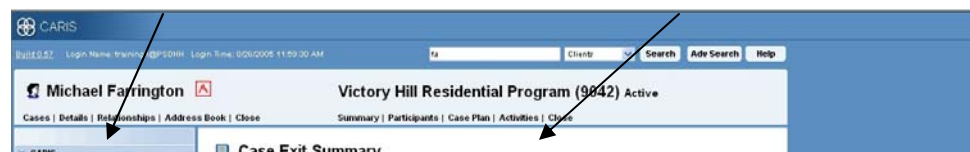
In metaphorical terms it's like the following: CARIS context is the filing cabinet; Client context is the client's set of file folders with his/her name and address tabs; and Case context contains the information in an individual client case file folder and enables you to read or add to the details of the worker/client interaction.

CARIS context is simply logging in and having access to reports and notifications prior to selecting a single client record for use. Administrators for instance, spend most of their time in CARIS context producing reports.

Client context orients the system function around a client and enables the user to have access to the client's demographic information and list of cases. This is a higher level view of the client shared amongst workers and provides no clinical details.

Case context orients the system to provide functions for management of the individual case. A client may have more than one case; but case context provides user functions for one case at a time.

The current context can be seen at anytime by viewing the context bar. The "Client in Context" will be to the left, and the "Case in Context" will be shown to the right.



1.5.10 ACTIVITIES

Clicking on “Activities” will produce a list of all the activities in which you have been involved during the time frame selected and concerning the activity type selected from the filter. If a Case is “In Context” (Section 1.8) then only those activities connected to that Case will be displayed. If no Case is “In Context” the activities displayed will only be those of a general or administrative nature and will NOT include Case specific activities. Note that there will always be a “Client” in context if there is a “Case” in context, but you can have a “Client” in context without a Case. There is no “Activities” function associated with just a Client.

The screenshot shows the CARIS PSDHH interface. The top navigation bar includes the CARIS logo, login information (Login Name: Ann, Login Time: 3/24/2006 11:00:03 AM), the PSDHH title, a search bar, and links for Clients, Search, Adv Search, and Help. The sidebar on the left contains a 'CARIS' dropdown menu with links to Waiting Lists, Beds, Eligibility Lists, Reports, and Organization Notes. The main content area is titled 'Activities Search' and contains a form with 'Start Date' (01/6/2006) and 'End Date' (3/24/2006) fields. A calendar widget for 'October 2005' is displayed, showing dates from 25 to 31. A callout box labeled 'Time Frame' points to the calendar. To the right of the calendar are 'Display Activities' and 'Cancel' buttons.

With no Case in context, you can access any non-case specific activities by defining the time frame and clicking “Display Activities”.

The screenshot shows the CARIS PSDHH interface. The top navigation bar includes the CARIS logo, login information (Login Name: Ann, Login Time: 3/24/2006 11:00:03 AM), the PSDHH title, a search bar, and links for Clients, Search, Adv Search, and Help. The sidebar on the left contains a 'CARIS' dropdown menu with links to Waiting Lists, Beds, Eligibility Lists, Reports, and Organization Notes. The main content area is titled 'Activities Display' and shows a list of activities. An 'Activity Filter' dropdown menu is visible, showing options like 'All Activities', 'All Activities', 'Announcement', 'Communication Note', 'Topic-Based consultation', and 'Safety Procedure'. A callout box labeled 'Activity Type Filter' points to the dropdown menu. The list of activities includes items like 'Communication Note (2006-03-07 12:00 AM)', 'Safety Procedure (2006-02-13 11:30 AM)', and 'Topic-Based consultation (2006-02-13 12:00 AM)'. Each item has an 'Edit' button next to it. The bottom right corner shows 'Page(s): 1 2 3'.

1.5.11 MY CASES

Clicking on “My Cases” will display a complete listing of all the Cases in which you, the User, are involved.

My Case List

Case Type	Case Status	My Case Role	Client Id	Client Name	Start Date
Consultative Services	Active	Case Manager	PKHAK-100000028	Khalzad, Prouz	2005-08-21
Deaf Access Office	Pre-Admit	Case Manager	PDEVD-100000001	Dew, Dry	2005-08-30
Victory Hill Residential Program	Active	Case Manager	PMARC-15	Marceau, Jason	2005-05-22
Youth Transition	Referral	Case Manager	PMARC-15	Marceau, Jason	2005-07-25

Case Status Filter: All, Pre-Admit, Active, Referral

View

You can shorten the list by using the Case Status filter, and you can see the details of a specific case by clicking on “View”. The Case Summary will display, with various options available. (Section 2.16 to 2.20)

Case Summary

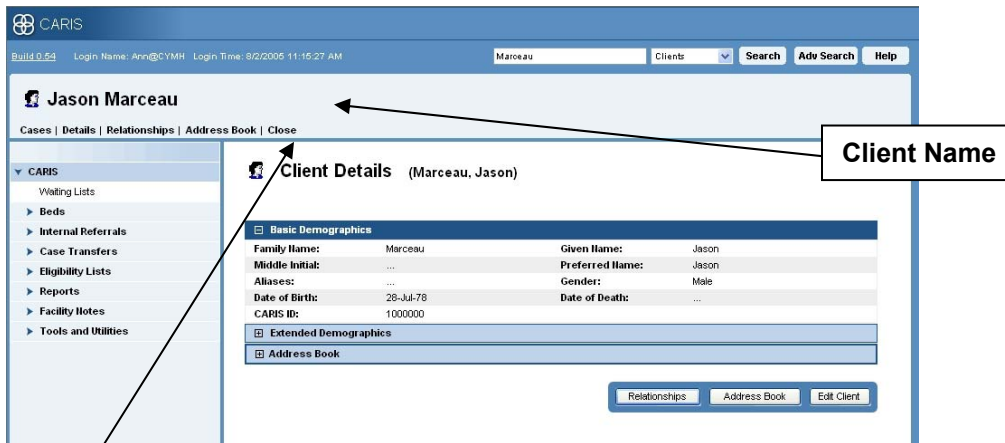
Case Type:	Deaf Access Office	Referral Date:	Aug-30-2005
Case Status:	Pre-Admit	Accept/Reject Date:	Aug-30-2005
Case Id:	18285	Admission Date:	...
Case Manager:	One, Ann_2	Est. Discharge Date:	...
Referral Source:	Addition Services	Discharge Date:	...
Referral Mode:	Fax	Case Close Date:	...
Bed Information:	...		
Waitlist Information:	...		

Reject Referral, Accept Referral, Cancel Case, Admit, Discharge, Close Case

1.6 CLIENT CONTEXT

The term “In Context” as used in this system means the Client and/or Case whose names appear in the Context Bar. (Section 1.7) Changes can only be made to a Client’s file when the Client is “In Context”. This is indicated by the client’s name being displayed on the Context Bar.

See also Section 1.5.9 – “Context” for a description of what “Context” means and how it works.

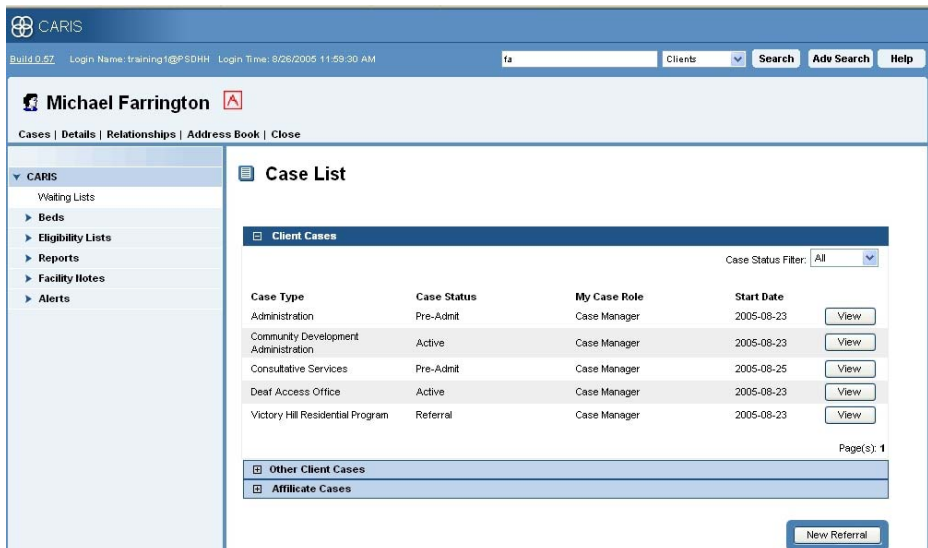


When performing ANY functions that involve a specific client, make sure that the client is “IN CONTEXT” before doing so.

You will note that a new row of functions displays under the Client’s name when a Client is “In Context”

1.6.1 CASES

Clicking on this item opens a window listing all the cases involving the Client who is “In Context”.



1.6.2 DETAILS

Clicking on “Details” opens the description of the Client’s demographic and other information.

Client Details (Farrington, Michael)

Basic Demographics			
Family Name:	Farrington	Given Name:	Michael
Middle Initial:	...	Preferred Name:	Mike
Aliases:	...	Gender:	Male
Date of Birth:	10-Mar-36	Date of Death:	...
CARIS ID:	1000053		

Relationships Address Book Edit Client

Clicking on the “+” will expand the “Extended Demographics” window.

Client Details (Farrington, Michael)

Extended Demographics			
Status in Canada:	Canadian Citizen	Employment Status:	Part Time
Ethno-cultural Background:	Armenian	Education Level:	Post Secondary
Preferred Language:	English	Education Type:	Other
Lang Spoken at Home:	English	Primary Living Arrangement:	None Of The Above
Religious Practice:	Pagan	Household Composition:	Lives Alone
Aboriginal Origin:	Non-aboriginal	Dental Plan:	...
Reservation Status:	...	PEH:	...
Band Status No.:	...	PHH:	1324567891
Disability:	Hard Of Hearing	SII Number:	...
Identifying Marks:	...	Guardianship Status:	Self

Relationships Address Book Edit Client

Clicking on the “+” will expand the “Address” window. (See Section 1.6.4)

1.6.3 RELATIONSHIPS

This item opens a window which displays the information about any other people involved with the client on a “Relationship” basis. (See Section 2.11 – Creating a Relationship)

Relationships (Farrington, Michael)

Person	Type	Relation	Start Date	End Date	IIRs
Farrington, Steve	Family	Brother	2005-08-30		Edit
Reginald, David	Family	Brother	2005-08-04	2005-09-11	Edit
Reginald, David	Family	Cousin	2005-09-12		Edit
Marceau, Jason	Social	Friend	2005-08-26		Edit

Page(s): 1

[New Relation](#)

1.6.4 ADDRESS BOOK

This tag takes you to the Client's pertinent addresses, telephone numbers and e-mail address(s). You may add as many addresses etc as you require. If there are many different items, you can reduce the ones that display by using the Location Type Filter which will then display only e-mails, addresses or telephone numbers.

Location Filter

Michael Farrington Cymh Outreach

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Address book management (Farrington, Michael)

Location Type Filter: All Types Add Address Add Telecom Add Email

Location	Person	Use	Start Date	End Date	Note
Address: 21 - 2345 downtown ave, victoria, BC, V8W3S2, CA					(Active)
Email: mike@planetearth.ca					(Active)
Phone: (250) 888-5678					(Active)

Page(s): 1

1.6.5 CLOSE

Closes the window and removes the Case from the "Context" bar, returning you to your Main Page with the Client still in context.

1.7 CASE CONTEXT

Some clients may be involved in more than one case, either as clients or as members or contacts. When performing any functions related to a specific case, make sure that the correct Case is also "In Context" before proceeding. (See 1.5.9 & 1.6.1)

CARIS Build 0.57 Login Name: Ann@CYMH Login Time: 9/13/2005 3:12:44 PM

Michael Farrington Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Case Summary

Case Type:	Cymh Outreach	Referral Date:	Aug-04-2005
Case Status:	Active	Accept/Reject Date:	Aug-04-2005
Case Id:	1289	Admission Date:	Aug-25-2005
Case Manager:	One, Ann_3	Est. Discharge Date:	...
Referral Source:	Self	Discharge Date:	...
Referral Mode:	Walk-in	Case Close Date:	...
Bed Information:	...		
Waitlist Information:	...		

Reject Referral Accept Referral Cancel Case Admit Discharge Close Case

You will see that a row of functions displays under the Case description. These elements provide information specific to that case.

1.7.1 SUMMARY

Provides basic information about a particular Case, and provides the option to alter the case status (“Discharge” the Client from the Case). (see previous screenshot).

1.7.2 PARTICIPANTS

Clicking on “Participants” displays a list of all “Members” who are attached to the particular Case. Members are other authorized people who are involved in the Case and who have access to the case files. Also displayed are “Affiliates” who are all the people who are affiliated with the Case. These are people who have an interest in some way in the Client and/or the Case but who do NOT have access to the case files.

Participants List

Members				
Name	Case Access	Start Date	End Date	
One, Ann_3	Case Manager	2005-08-04		Remove
Huber, Anna-Maria	Case Worker	2005-08-08	2005-08-30	Remove

Page(s): 1

Affiliates				
Name	Role	Start Date	End Date	
Reginald, David	General	2005-08-22		Remove
Dean, Steve	General	2005-08-22		Remove

Page(s): 1

1.7.3 CASE PLAN

The Case Plan contains the Goals and Objectives regarding the Client and this Case. There can be more than one Goal and more than one Objective for each Goal. (See Section 2.22)

Goals and Objectives

GOAL: Youth Placement [In-Progress]

Goal Details: [Edit](#) [Delete](#) [Create Objective](#)

Priority: PRIORITY_1 Status: Active
Critical Date: 2005-09-12
Start Date: 2005-09-12 End Date: 2005-09-12
Note: Michael needs a job right away to pay his rent

OBJECTIVE: Help him retain his own apartment [In-Progress]

[Edit](#) [Delete](#) [Create Action](#)

Priority: PRIORITY_1 Status: Pending Activity
Critical Date: 2005-09-13 Approach: Psychological
Start Date: 2005-09-13 End Date: 2005-09-13
Note: He needs to keep his apartment where he has lived for three years and where he feels safe.

Page(s): 1

[Create Goal](#)

1.7.4 ACTIVITIES

Clicking on “Activities” will produce a list of all the activities of the case in context during the time frame selected and concerning the activity type selected from the filter. When a Client and/or Case is “In Context” then only those activities connected to that Client/Case will be displayed. When you click on “Activities” you will be asked to define the search in terms of type and time frame.

Activities Search

Keyword:

Activity Type:

Start Date: 9/13/2005

End Date: 9/13/2005

Display Activities Cancel

When you have selected the appropriate filters, click on “Display Activities” and all the activities which are included in the type and time frame will be displayed.

Activities Display

Activity Filter: All Activities

Admitted by Ann (2005-08-25 15:34)

Medication Intervention

Medication Intervention

Medication Intervention

Case Affiliate Update by Ann (2005-08-22 15:00)

Client-Based Consultation by Ann (2005-08-22 14:28) Edit

Case Affiliate Update by Ann (2005-08-22 14:23)

Case Affiliate Update by Ann (2005-08-22 14:24)

Record Correspondence Log Event by Ann (2005-08-22 13:56) Edit

Case Member Update by Ann (2005-08-08 15:42:52.17)

Client Alert by Ann (2005-08-05 13:38:05.91)

Accepted by Ann (2005-08-04 10:27:44.70)

Page(s): 1

1.7.5 CLOSE

Clicking “Close” under the Case will close the Case but leave the Client still “In Context”. Clicking “Close” under the Client closes both the Case and the Client.

1.8 SEARCHING FOR A CLIENT, CONTACT, MEMBER OR ORGANIZATION

The database contains the names and demographics of every person in CARIS, and any organization that has been entered. In this case, you have access to the entire database, not just your own clients or organizations. However, the information that is available to you when you do access someone else's client, for example, will be limited to basic demographic information so that the client's privacy is protected.

In a typical situation, you may have a walk-in person requesting service and you want to see if they are already in the system. You type in their name and it displays as a client. You can click on "Cases" and see if the person is already involved in a case (Other Client Cases) and who the particular case manager (or member) is so you can refer the person to them or consult with them.

It is important that duplication is avoided so the system is set up so that you **MUST** search for a name before you can "Create a New Client". Because people use aliases and variations of their names, try to search for as many known names as possible if there is any doubt.

Once a name is entered into the system it cannot be deleted. If a duplication occurs, an administrative decision must be made to deal with it. Usually the information will be consolidated into one of the files and the other one de-populated and left with a note referring you to the complete, active file.

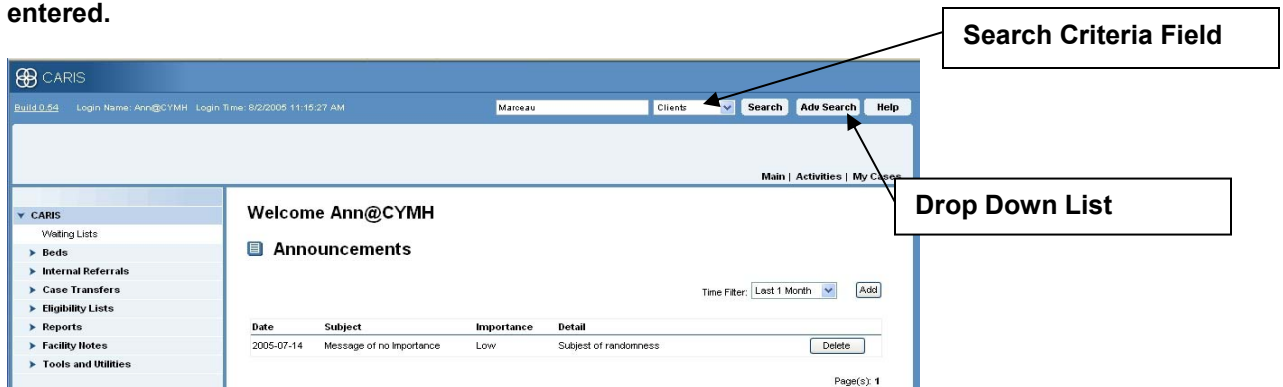
1.8.1 BASIC SEARCH

The basic "Search" function is "inclusive" in that it will produce a list of all persons whose demographics contain all or part of the criteria entered in the field. The field requires as few as two letters to function. The more letters you enter the narrower the search will be.

For example: If you typed in "urk", you would get a list that contained everyone in the database who had "urk" mentioned in their name or demographic info, not just "Burke" or "Gurka", but someone who had a tattoo of a "Turkey".

NOTE: If there are more than 45 people in the database who match the criteria, you will get a prompt that asks you to refine, or narrow, your criteria to reduce the range of possible responses.

Searches can be performed at any time, regardless of who is in Context or what other function you are performing. However, you will leave the "window" you were in and end up with the search results. You will also lose any inputted data from the previous window that has not been saved or entered.



To conduct a search:

Enter a name or part of a name in the Search Criteria field.
From the drop down list, select "Client" "Contact" "Member" or "Organization"
Click on the "Search" button.

A list of all persons in the database whose name(s) or demographics match the search criteria, and who fit the drop down Search category will display.

Build 0.54 Login Name: Ann@CYMH Login Time: 6/2/2005 11:15:27 AM Marceau Clients Search Adv Search Help

Main | Activities | My Cases

Client Search Results

CARIS ID	Client Name	Birth Date	
1000000	Marceau, Jason	1979-07-28	View
1000027	Marceau, Jean	1985-05-22	View

Page(s): 1

[Advanced Search](#) [Create Client](#)

NOTE: When you search for a person as a "Client", you can click on View to view the Client Details. The person is now "in Client Context" and you can edit or add to the client's basic and extended demographic information. But, when you search for the same person as a "Contact" and then view the details, only a brief summary of contact information such as name, date of birth and address is presented and the person is not "in Client Context".

1.8.2 ADVANCED SEARCH

The Advanced Search is an "exclusive" search engine. This means that the results of the search will only contain exactly what you typed in any of the fields in the Search window. Consequently, the more fields that are filled in, the more exclusive the resulting search will be. The Advanced Search has the same general fields as the demographics form and enables highly specific searches.

Build 0.54 Login Name: Ann@CYMH Login Time: 6/2/2005 4:09:44 PM Clients Search Adv Search Help

Main | Activities | My Cases

Advanced Search: Client

Clients | Contacts | Organizations

Basic Demographics

CARIS ID:

Family Name: Given Name:

Middle Initial: Preferred Name:

Aliases: Gender:

Date of Birth: Date of Death:

Extended Demographics

Locations

[Search](#)

Type in a name

To perform an advanced search:

Type in as much data as you require in as many fields as you wish.
Click on "Search".

All the clients whose demographic data includes "Michael" will display.

NOTE: The names and data are not case sensitive so you don't have to use capital first initials.

Build 0.67 Login Name: Ann@PSDHH Login Time: 9/12/2005 2:39:51 PM

Main | Activities | My Cases

Client Search Results

CARIS ID	Client Name	Birth Date	
1000029	Duncan, Michael	1990-01-31	View
1000192	Zeus, Michael	1987-06-15	View
1000053	Farrington, Michael	1936-03-10	View

Page(s): 1

[Advanced Search](#) [Create Client](#)

If you had typed in “Michae” and missed the last “l” like this –

Build 0.64 Login Name: Ann@CYMH Login Time: 8/4/2005 4:09:44 PM

Main | Activities | My Cases

Advanced Search: Client

Clients | Contacts | Organizations

Basic Demographics

CARIS ID:

Family Name: Given Name:

Middle Initial: Preferred Name:

Aliases: Gender:

Date of Birth: Date of Death:

Extended Demographics

Locations

[Search](#)

Then you would receive this result

Build 0.64 Login Name: Ann@CYMH Login Time: 8/4/2005 4:09:44 PM

Main | Activities | My Cases

Client Search Results

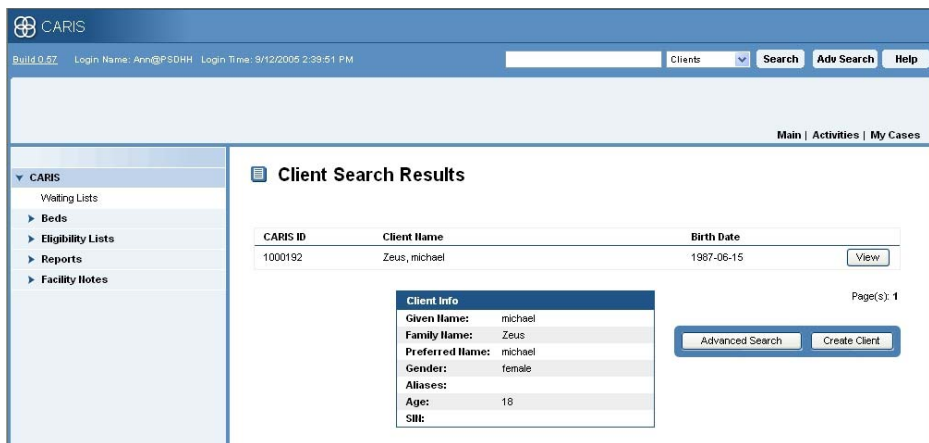
CARIS ID	Client Name	Birth Date
The search returned no results. You can try advanced search or create a new client.		

Page(s): 1

[Advanced Search](#) [Create Client](#)

(Unless there was an entry somewhere in the database that said “Michae” in which case that entry would display as a result.)

If you had selected “female” from the gender drop down list, then ONLY the female “Michael” would display on the Results list.



NOTE: You cannot perform an advanced search for a Member. An advanced search for a member is unnecessary because a basic search will always produce the required member.

1.9 HELP

The Help function will link you to a pdf version of this Manual.

1.10 SYSTEM ERROR

Occasionally you may receive a “System Error” prompt, usually when you first log into the system. If this occurs, click on the “Refresh” button on your browser toolbar. This will usually work. If it doesn’t, then log off the system and log on again. If this still doesn’t solve the problem, then you may have to shut your computer down and restart.

This typically is a local terminal problem rather than a CARIS problem.

2 Client and Case Management

It is important to remember that the database contains names of “persons”. These persons can be clients, contacts, or members. A person can be any one of those categories, or they can be two of them or all three. It is unlikely, however, that a member will also be a client.

It is important that you search for a person as a client, or contact, because the way you search will affect what you can do with the information afterwards. (see 1.8.1)

2.1 CREATING A NEW CLIENT

To create a new client is basically to enter a new person into the system database. To avoid duplication, the system requires you to perform a search for the person before you create a new one. To Create, or enter, a New Client:

Perform a search as in 1.8.1 or 1.8.2.

If the search produces no results:

Click on “Create Client”

CARIS

Build 0.54 Login Name: Ann@CYMH Login Time: 8/4/2005 4:09:44 PM

Clients Search Adv Search Help

Main | Activities | My Cases

Client Search Results

CARIS ID	Client Name	Birth Date
The search returned no results. You can try advanced search or create a new client.		

Page(s): 1

Advanced Search Create Client

The “Create Client” form will display.

CARIS

Build 0.54 Login Name: Ann@CYMH Login Time: 8/4/2005 7:20:24 AM

Clients Search Adv Search Help

Main | Activities | My Cases

Create Client

Basic Demographics

Family Name: Given Name:

Middle Initial: Preferred Name:

Aliases: Gender:

Date of Birth:

Extended Demographics

Reset Create Client Cancel

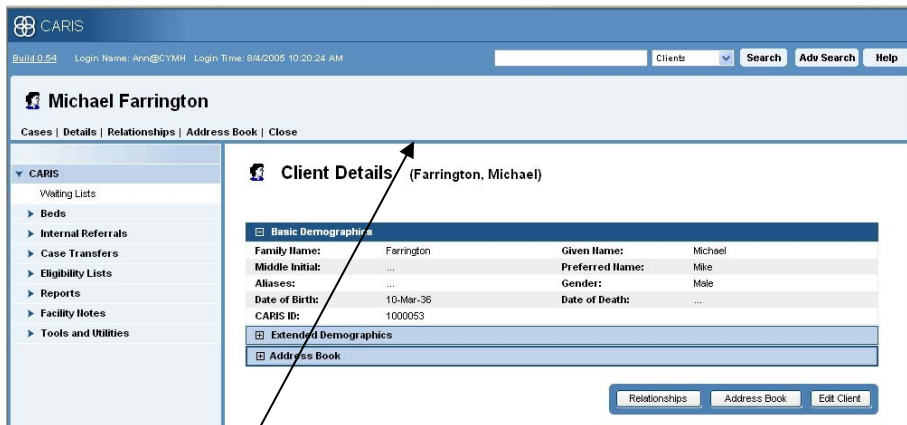
Fill in the fields
Click on the + sign to open the “extended demographics” box.
Fill in as many fields as you can.
Click “Create Client”

A dialogue box will display asking you if you want to create this client.



Click “OK”

The Client Details box will display containing the information you have entered.



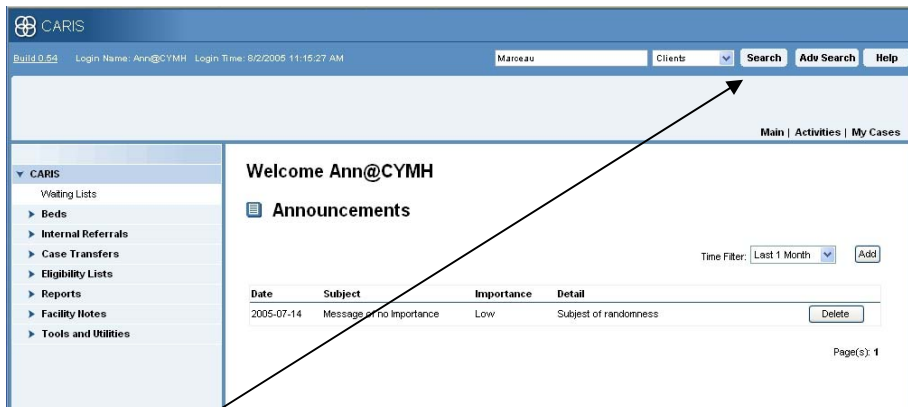
You have now added a new client to the system database. If you now exit from this window (by clicking “close”) the new client will be saved. However, if you open “My Cases” later, the client will not appear because you have not yet opened a case for this client. Unless you just wanted to record details regarding this client, normally you would proceed to “Create a New Case” for this client. (Section 2.16)

Note that anyone who has CARIS access in your organization will now have access to the demographic information you have entered if they perform a search for that client.

2.2 FINDING AN EXISTING CLIENT

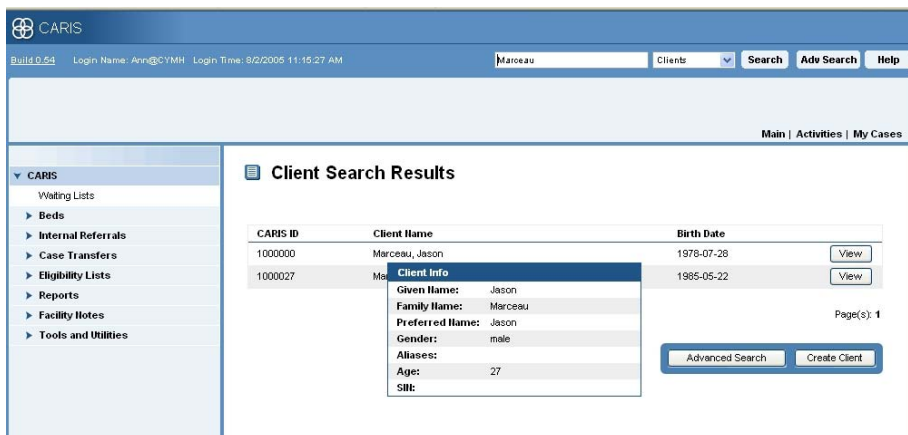
To find a client who is already in the system:

Type in all or part of the client’s name in the “Search Criteria” field.



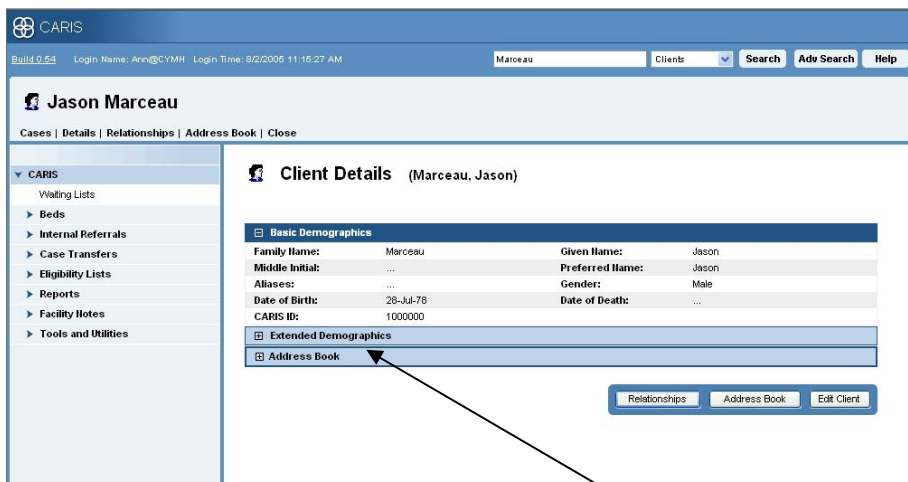
Click “Search”

A list of all clients with “Marceau” as part of their demographics will display.



Click “View”

The Client Details window will display.



Confirm the client’s identity by clicking the “Extended Demographics” + sign

CARIS
Build 9.54 Login Name: Ann@CYMH Login Time: 8/2/2005 11:15:27 AM Marceau Clients Search Adv Search Help

Jason Marceau
Cases | Details | Relationships | Address Book | Close

Client Details (Marceau, Jason)

Basic Demographics

Status in Canada:	Canadian Citizen	Employment Status:	Part Time
Ethno-cultural Background:	Canadian	Education Level:	Grade 2
Preferred Language:	Armenian	Education Type:	Home School
Lang Spoken at Home:	Asiatic Language	Primary Living Arrangement:	Group Home
Religious Practice:	Christian Not Included Elsewhere	Household Composition:	Group Setting
Aboriginal Origin:	Non-aboriginal	Dental Plan:	...
Band Status No.:	...	PEH:	...
Guardianship Status:	Ctcs - Temporary Custody	PHN:	6546549641
Disability:	...	SIN Number:	...
Identifying Marks:	...		

Address Book

Location	Use	Start Date	End Date	Notes
123 - 23423 Some Street, Victoria, BC, V8X4H4, CA	Primary	2005-07-12T00:00:00	2005-07-12T00:00:00	
(321) 516-5163	Primary	2005-07-12T00:00:00	2005-07-12T00:00:00	
123 Street Name, Victoria, BC, V0V0V0, CA	ICM/Work	2005-07-26T00:00:00	2005-07-26T00:00:00	

Page(s): 1

Relationships Address Book Edit Client

Check the demographics.

2.3 EDITING AN EXISTING CLIENT

Editing client demographics may be a function that you have not been authorized to perform. If this is the case, the “Edit Client” button will be *grayed* out and you will be unable to perform this operation.

To edit the file of an existing client, once you have found the client and confirmed the identity,

Click the “Edit Client” button.

CARIS
Build 9.54 Login Name: Ann@CYMH Login Time: 8/4/2005 10:20:24 AM Clients Search Adv Search Help

Michael Farrington
Cases | Details | Relationships | Address Book | Close Summary | Members | Affiliates | Case Plan | Activities | Close

Edit Client (Farrington, Michael)

Basic Demographics

Status in Canada:		Employment Status:	
Ethno-cultural Background:		Education Level:	
Preferred Language:		Education Type:	
Lang Spoken at Home:		Primary Living Arrangement:	
Religious Practice:		Household Composition:	
Aboriginal Origin:		Dental Plan:	
Band Status No.:		PEN:	
Guardianship Status:		PHN:	
Disability:		SIN Number:	
Identifying Marks:			

Reset Save Changes Cancel

The “Edit Client” window will display and you can proceed to complete more fields or change existing information.

If you change your mind, click the “Reset” button and your changes will be erased and the original entries restored. Clicking “Cancel” will return you to “Client Details”

- 4) Click “Save Changes” to retain your editing, and the new demographic information will be saved.

2.4 CREATING A NEW CONTACT

To create a new Contact is to enter a new person into the system database. A Contact is typically a person who is in some way connected to an existing or new Client or Case, but who does not have access to the file. A Contact can also be a person connected with the work that you, or your co-workers, perform such as a physician, minister, police officer, government worker and so on. To avoid duplication, the system requires you to perform a search for the person before you create a new one. To Create, or enter, a New Contact:

Perform a search as in 1.8.1 or 1.8.2, but use the drop down list to select “Contact”.

If the search produces no results:

Build 0.54 Login Name: Ann@CYMH Login Time: 8/6/2005 10:00:37 AM zof Contacts Search Adv Search Help

Main | Activities | My Cases

Contact Search Results

CARIS ID	Contact Name	Birth Date
The search returned no results. You can try advanced search or create a new contact.		

Page(s): 1

Advanced Search Create Contact

Click on “Create Contact”

Build 0.54 Login Name: Ann@CYMH Login Time: 8/6/2005 10:00:37 AM zof Contacts Search Adv Search Help

Main | Activities | My Cases

Create Contact

Family Name:	Scrooge	Given Name:	Ebenezer
Preferred Name:	Eb	Aliases:	
Date of Birth:	December 25 1925	Gender:	Male
Date of Death:			

Reset Create Contact Cancel

The “Create Contact” form will display.

Fill in as many fields as you can.
Click “Create Contact”

A dialogue box will display asking you if you want to create this contact.



Click “OK”

The Contact Details box will display containing the information you have entered.

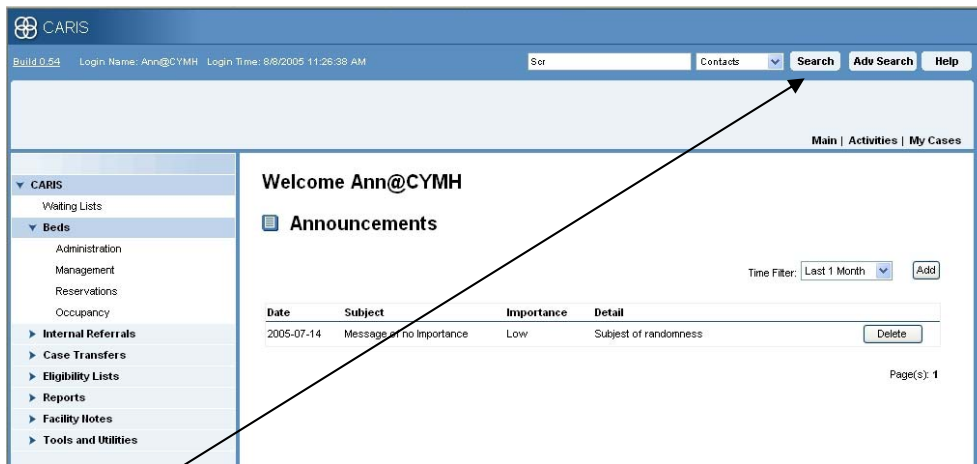
A screenshot of the CARIS software interface. The top bar shows "CARIS" and login information: "Build 0.64", "Login Name: Ann@CYMH", "Login Time: 8/8/2005 10:00:37 AM". There is a search bar with "zof" entered and buttons for "Search", "Adv Search", and "Help". A sidebar on the left lists navigation options: "CARIS", "Waiting Lists", "Beds", "Internal Referrals", "Case Transfers", "Eligibility Lists", "Reports", "Facility Notes", and "Tools and Utilities". The main area is titled "Contact Details (Scrooge, Ebenezer)". It contains a form with the following fields: "Family Name: Scrooge", "Given Name: Ebenezer", "Preferred Name: Eb", "Aliases: ...", "Date of Birth: 25-Dec-25", "Gender: Male", and "Date of Death: ...". Below these are expandable sections for "Address Book" and "Relationships". At the bottom are buttons: "Add to Case", "Relate to Client", "Relationships", "Address Book", and "Edit Contact".

You have now added a new contact to the system database.

2.5 FINDING AN EXISTING CONTACT

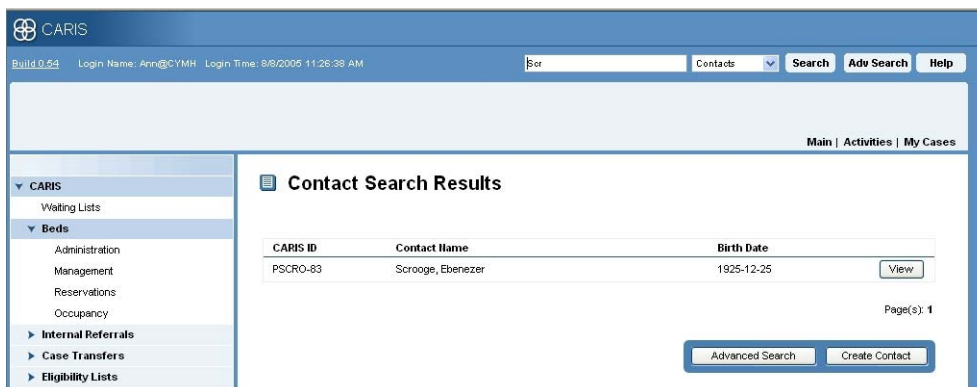
To find a contact who is already in the system:

Type in all or part of the contact’s name in the “Search Criteria” field.



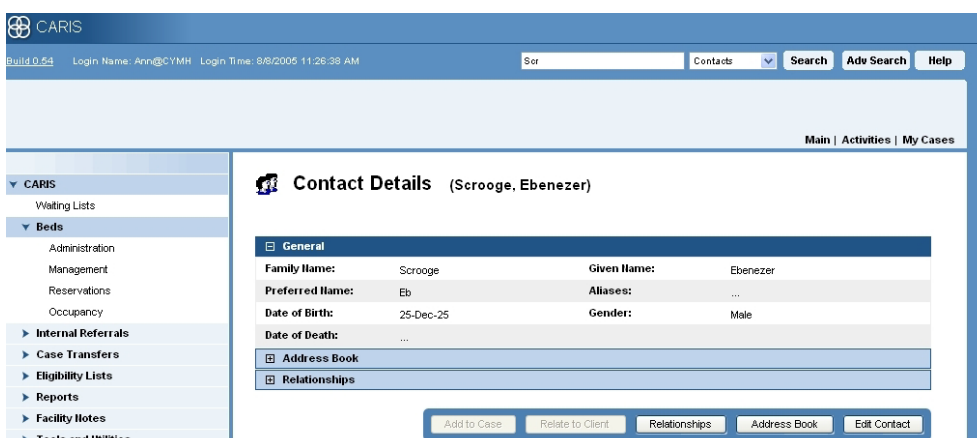
Click “Search”

A list of all contacts with “Scr” as part of their demographics will display.



Click “View”

The “Contact Details” window will display.



NOTE: You will notice that there are no “Extended Demographics” shown when “Scrooge” is accessed as a “Contact”. This is a privacy function. If you had accessed “Scrooge” as a “Client”, the “Extended Demographics” would be viewable and therefore changeable. At that point, Scrooge as a “Contact” becomes “Scrooge” as a “Client” and a Case may be created for him. If you don’t create a Case, he stays in the database as a “Contact”. You can access anyone in the database as

either a “Client” or a “Contact” It depends on what you want to do with the person afterwards that determines how you will access them.

CONTACTS, CLIENTS AND MEMBERS

To clarify these three “person” descriptions:

A Client is a person who is the primary person in a Case and who is receiving service.

A Contact is a person who is connected to a Case but who cannot view the Case or is just a person of interest to the Agency or the Case Worker(s).

A Member is a person who is connected to a specific Case and who has access to the CARIS Case File of that Client.

2.6 EDITING AN EXISTING CONTACT

Editing contact demographics may be a function that you have not been authorized to perform. If this is the case, the “Edit Contact” button will be *grayed out* and you will be unable to perform this operation.

To edit the file of an existing contact, once you have found the contact and confirmed the identity, Click the “Edit Contact” button.

The screenshot displays the CARIS software interface. On the left is a sidebar with a tree view containing categories like 'CARIS', 'Waiting Lists', 'Beds', 'Internal Referrals', 'Case Transfers', 'Eligibility Lists', 'Reports', 'Facility Notes', and 'Tools and Utilities'. The main window is titled 'Contact Details (Scrooge, Ebenezer)'. It features a 'General' tab with fields for Family Name (Scrooge), Given Name (Ebenezer), Preferred Name (Eb), Aliases (...), Date of Birth (25-Dec-25), Date of Death (...), and Gender (Male). Below this is an 'Address Book' section and a 'Relationships' section. At the bottom of the window, there is a row of buttons: 'Add to Case', 'Relate to Client', 'Relationships', 'Address Book', and 'Edit Contact'. An arrow from the text 'Click the “Edit Contact” button.' points directly to the 'Edit Contact' button.

The “Edit Contact” window will display and you can proceed to complete more fields or change existing information.

Build 0.54 Login Name: Ann@CYMH Login Time: 8/6/2005 11:34:33 AM

Ebenezer Scrooge

Cases | Details | Relationships | Address Book | Close

▼ CARIS

- Waiting Lists
- Beds
- Internal Referrals
- Case Transfers
- Eligibility Lists
- Reports
- Facility Notes
- Tools and Utilities

Edit Contact (Scrooge, Ebenezer)

Family Name: Given Name:

Preferred Name: Aliases:

Date of Birth: Gender:

Date of Death:

If you change your mind, click the “Reset” button and your changes will be erased and the original entries restored. Clicking “Cancel” will return you to “Contact Details”

Click “Save Changes” to retain your editing, and the new demographic information will be saved.

(See Note above in Section 2.5 re: “Extended Demographics”)

2.7 FINDING A MEMBER

To find a member who is already in the system:

Type in all or part of the member’s name in the “Search Criteria” field. Select “Members” from the drop down list

Build 0.54 Login Name: Ann@CYMH Login Time: 8/6/2005 11:34:33 AM

Michael Farrington

Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close

Summary | Members | Affiliates | Case Plan | Activities | Close

▼ CARIS

- Waiting Lists
- Internal Referrals
- Case Transfers
- Eligibility Lists
- Reports
- Facility Notes
- Case Notes
- Case Forms
- Tools and Utilities

Case Summary

Case Type:	Cymh Outreach	Referral Date:	Aug-04-2005
Case Status:	Pre-Admit	Accept/Reject Date:	Aug-04-2005
Case Id:	1289	Admission Date:	...
Case Manager:	One, Ann_3	Est. Discharge Date:	...
Referral Source:	Self	Discharge Date:	...
Referral Mode:	Walk-in	Case Close Date:	...
Bed Information:	...		
Waitlist Information:	...		

Click “Search”

A list of all members with “Ma” as part of their demographics will display.



Click “View” beside the member whose details you want to see.

The “Member Details” window will display.



You will notice that only basic information is provided. This is for privacy and security reasons. You can neither edit nor create a member, all you may do is assign an existing member to your case. (See Section 2.21). Creating and editing are administrative functions.

2.8 CREATING A NEW ORGANIZATION

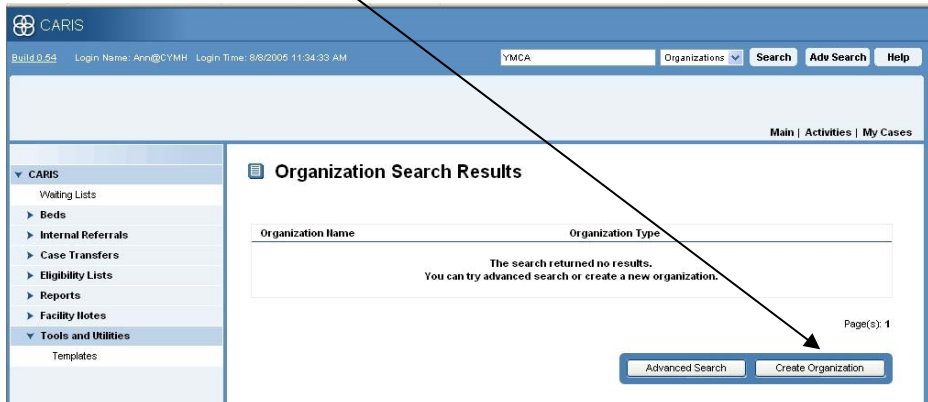
To create a new organization is to add an organization to the database. Organizations are either external such as the YW/YMCA, Jubilee Hospital, or another government department or agency, or they could be an internal department or agency such as “Child Care” or “Special Needs”. The listing will provide descriptive and contact information for the organization. To avoid duplication, the system requires you to perform a search for the organization before you create a new one. To Create, or enter, a New Organization:

Perform a search as in 1.8.1 or 1.8.2.

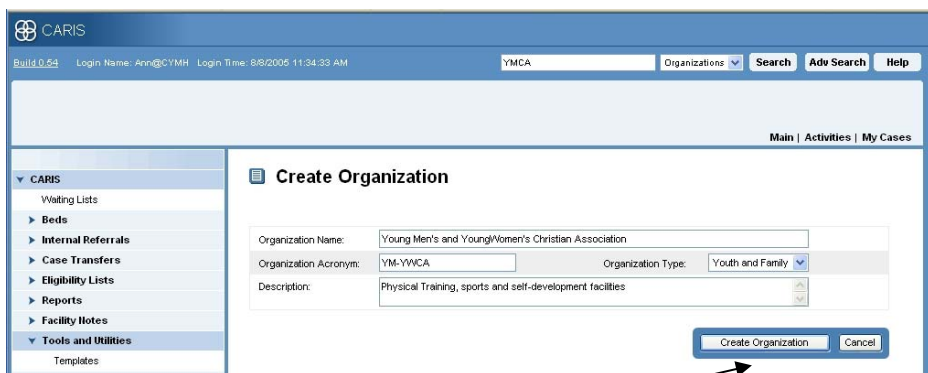
NOTE: You may want to search using a variety of input criteria since people often refer to organizations in different ways. For example, “The Y” or “YMCA” and do not use its full name. So if someone has entered the Young Women’s and Men’s Christian Association in the database as the organization name, typing YMCA into the search criteria field would not register a “hit” and thus will not bring up the organization.

If the search produces no results:

Click on “Create Organization”



The “Create Organization” form will display.



Fill in as many fields as you can.

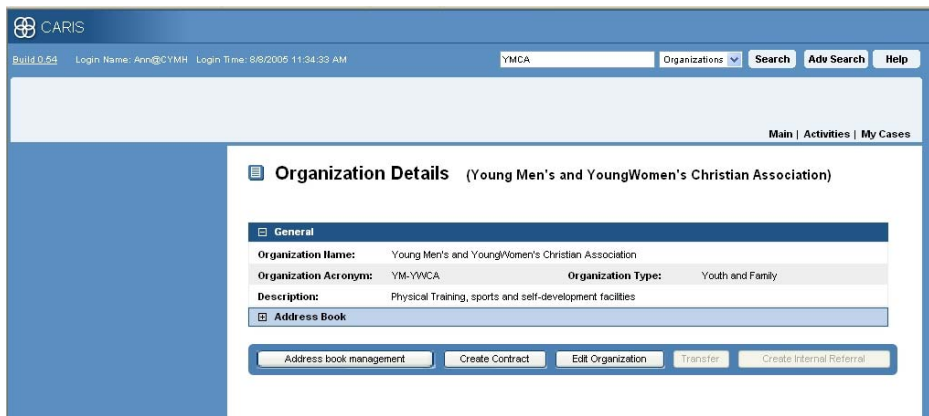
Click “Create Organization”

A dialogue box will display asking you if you want to create this organization.



Click “OK”

The Organization Details box will display containing the information you have entered.

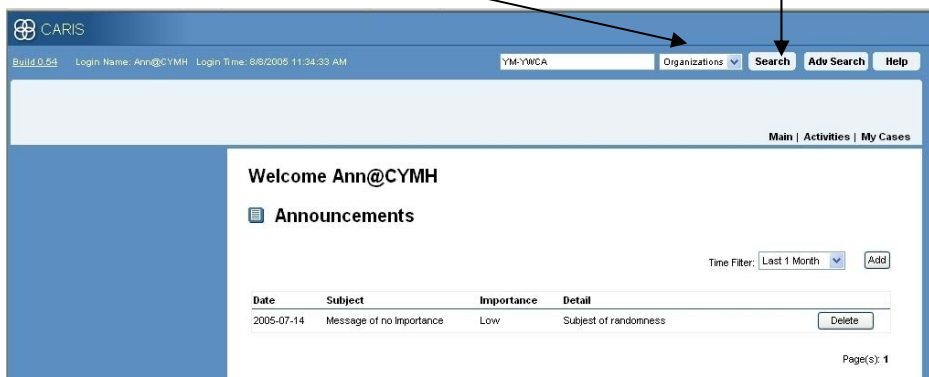


You have now added a new organization to the system database.

2.9 FINDING AN EXISTING ORGANIZATION

To find an organization that is already in the system:

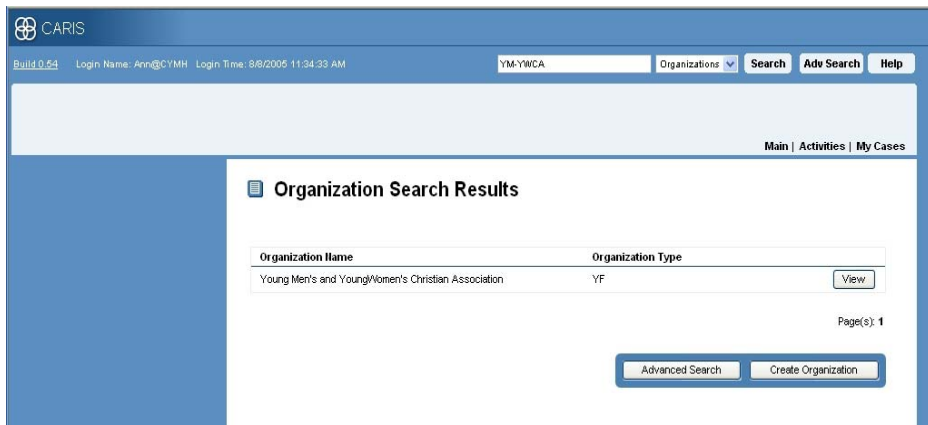
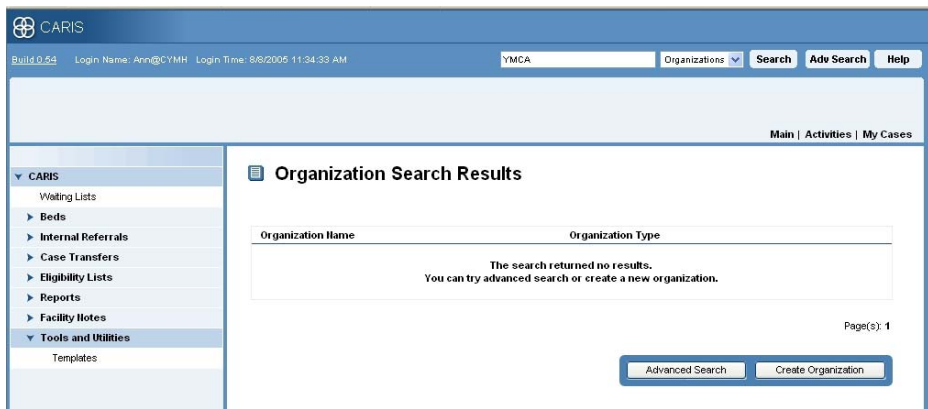
Type in all or part of the organization's name in the "Search Criteria" field.
Select "Organizations" from the drop down list



Click "Search"

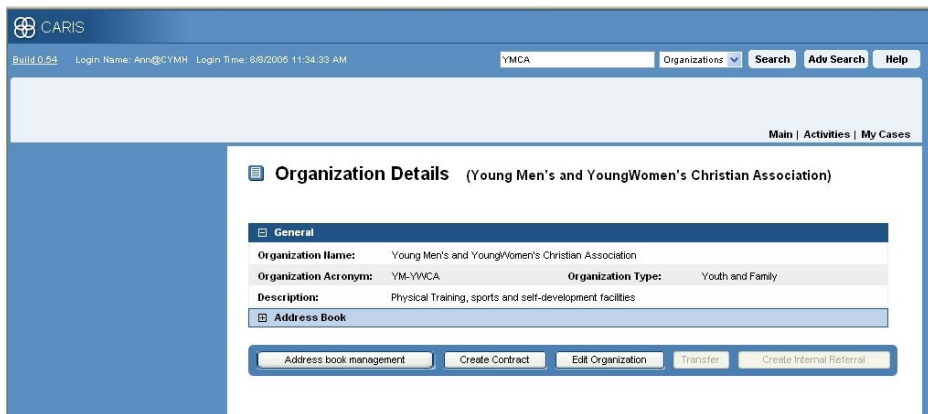
A list of all organizations with "YW-YMCA" as part of their demographics will display.

NOTE: You have to be careful when typing in the criteria. In this case, had you typed in just "YMCA" you would have received a "No Results" notice. This is because, even though many people refer to the "Y" as the "YMCA", in fact the acronym was entered as the "YM-YWCA" and as such, no part of either the full name or the acronym contains the sequence "YMCA". So, if you don't get a result, it's a good idea to try some different combinations before you proceed to create a new organization.



Click “View”

The Organization Details window will display.

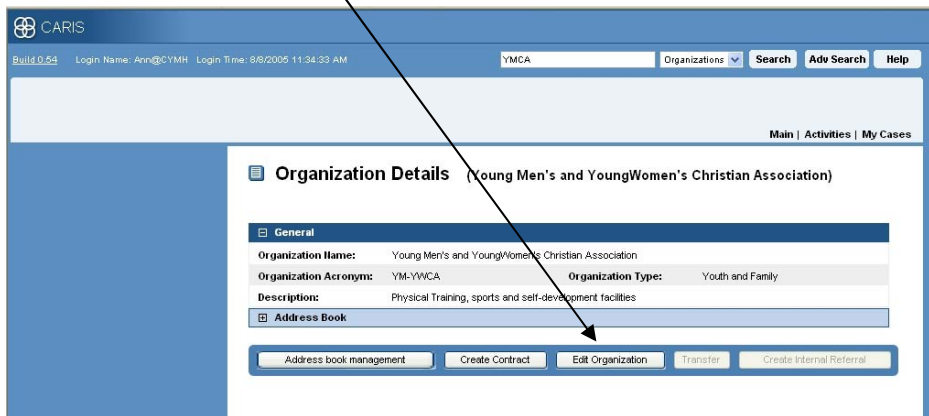


2.10 EDITING AN EXISTING ORGANIZATION

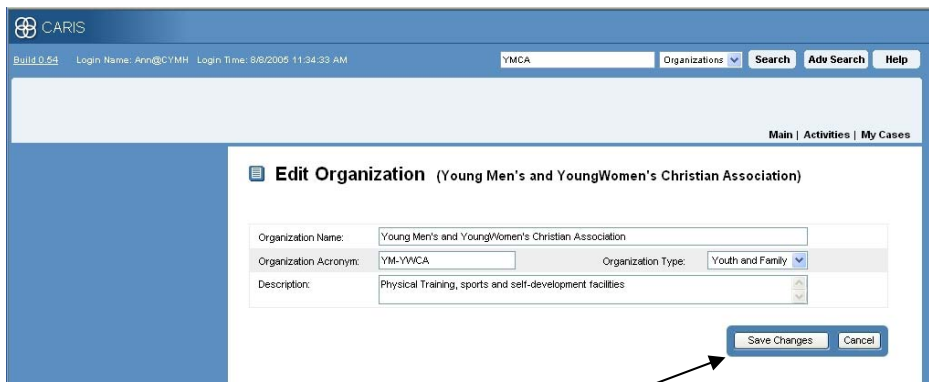
Editing existing organization details may be a function that you have not been authorized to perform. If this is the case, the “Edit Organization” button will be *grayed out* and you will be unable to perform this operation.

To edit the file of an existing organization, once you have found the organization and confirmed its identity,

Click the “Edit Organization” button.



The “Edit Organization” window will display and you can proceed to complete more fields or change existing information.



If you change your mind, click the “Cancel” button and you will return to “Organization Details”

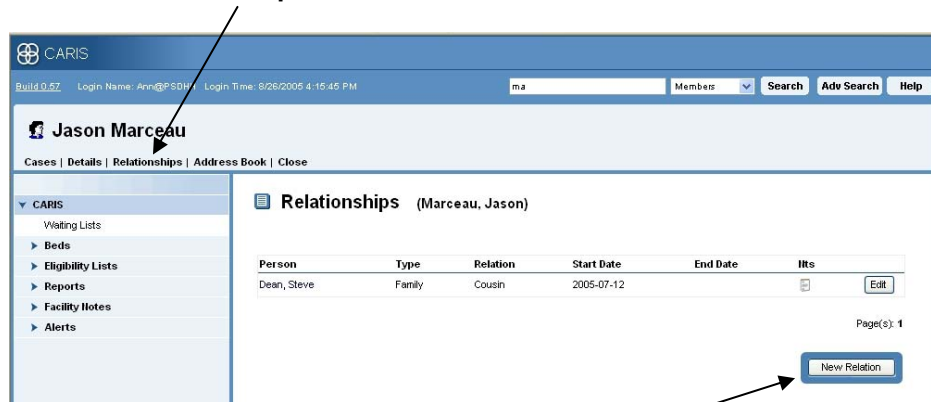
Click “Save Changes” to retain your editing, and the new demographic information will be saved.

2.11 CREATING A NEW RELATIONSHIP

A Relationship describes a connection between a client and a person who is familiarly or socially related. The relationship is for reference purposes since the person has no access to the case.

To Create a Relationship,

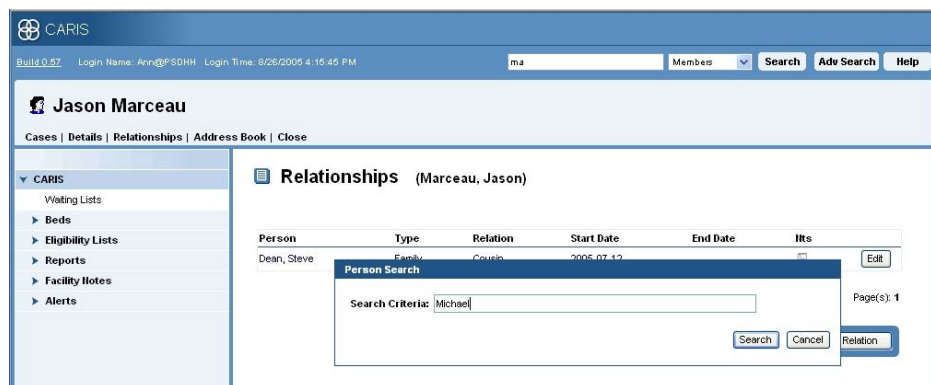
Bring the client into context.
Click on “Relationships”



If the person is not already on the list,

Click “New Relation”

A Search window will display.



Enter the person's name
Click “Search”

Person Search

Search Criteria: Michael

Search Cancel Relate

Name	Birth Date	Relate
Duncan, Michael	1990-01-31	Relate
Farrington, Michael	1936-03-10	Relate

Page(s): 1

Create Contact

Select the appropriate person from the search results.
Click "Relate"

The Relationship data window will display.

Relationship

Relationship Type: Social

"Farrington, Michael" is Friend of "Marceau, Jason"

Start Date: 8/26/2005

End Date: 10/10/2005

Notes:

Save Relationship Cancel

Fill in the appropriate fields
Click "Save Relationship"

The Relationship window will now include the new relationship.

Relationships (Marceau, Jason)

Person	Type	Relation	Start Date	End Date	It's
Dean, Steve	Family	Cousin	2005-07-12		Edit
Farrington, Michael	Social	Friend	2005-08-26		Edit

Page(s): 1

New Relation

2.12 FINDING AN EXISTING RELATIONSHIP

To find details about an existing relationship, with the client “In Context”, on the Client Details window:

Click on “Relationships”

The screenshot shows the CARIS Client Details window for Michael Farrington. The left sidebar contains a menu with 'CARIS' and 'Waiting Lists' expanded. The main content area shows 'Client Details (Farrington, Michael)' with tabs for 'Basic Demographics', 'Extended Demographics', and 'Address Book'. The 'Basic Demographics' tab is active, displaying fields for Family Name, Middle Initial, Aliases, Date of Birth, CARIS ID, Given Name, Preferred Name, and Gender. At the bottom right, there are three buttons: 'Relationships', 'Address Book', and 'Edit Client'. An arrow points from the text 'Click on “Relationships”' to the 'Relationships' button.

A list of all recorded relationships to the client will display.

The screenshot shows the CARIS Relationships window for Michael Farrington. The left sidebar is the same as in the previous screenshot. The main content area shows 'Relationships (Farrington, Michael)' with a table of relationships. The table has columns: Person, Type, Relation, Start Date, End Date, and Iits. The table lists three relationships: Farrington, Steve (Family, Brother, 2005-08-30), Reginald, David (Family, Brother, 2005-08-04), and Marceau, Jason (Social, Friend, 2005-08-26). Each row has an 'Edit' button. At the bottom right, there is a 'New Relation' button. The page number 'Page(s): 1' is also visible.

Person	Type	Relation	Start Date	End Date	Iits
Farrington, Steve	Family	Brother	2005-08-30		Edit
Reginald, David	Family	Brother	2005-08-04		Edit
Marceau, Jason	Social	Friend	2005-08-26		Edit

2.13 EDITING AN EXISTING RELATIONSHIP

To edit any of the listed relationships, or to view details, from the Relationship list (see 2.12):

Click on “Edit”

Relationships (Farrington, Michael)

Person	Type	Relation	Start Date	End Date	IIS
Farrington, Steve	Family	Brother	2005-08-30		

Relationship

Relationship Type:

"Reginald, David" is of "Farrington, Michael"

Start Date:

End Date:

Notes:

Page(s): 1

Enter the changes you wish to make, change the dates or add a note.
Click on "Save Relationship"

You will see that the only things you can change are the end date and the notes. Once a relationship has been saved, it cannot be changed as far as the type or the relationship is concerned. If you wish to change either of these items:

Click on "Edit"

Enter today's date as the "End Date"

Add a note about why you are doing this.

Save Relationship

You will not be able to add a new relationship using the same name until tomorrow when the previous one will have been ended.

2.14 CREATING AN AFFILIATE

An affiliate is a person who has a direct or indirect interest in a particular case.

A Relation is related to the person; an Affiliate is related to the case. An Affiliate is typically a relative, a physician, a case worker from another agency or a police officer for example.

To add an affiliate to a client's case file, the client and case must be in context.

Case Summary

Case Type:	Cymh Outreach	Referral Date:	Aug-04-2005
Case Status:	Pre-Admit	Accept/Reject Date:	Aug-04-2005
Case ID:	1289	Admission Date:	...
Case Manager:	Cme, Ann_3	Est. Discharge Date:	...
Referral Source:	Self	Discharge Date:	...
Referral Mode:	Walk-in	Case Close Date:	...
Bed Information:	...		
Waitlist Information:	...		

Click on "Participants"

The list of participants, including affiliates, attached to the client/case will display.

Participants List

Members				
Name	Case Access	Start Date	End Date	
One, Ann_3	Case Manager	2005-08-04		Remove
Huber, Anna-Maria	Case Worker	2005-08-08	2005-08-30	Remove

Page(s): 1

Affiliates				
Name	Role	Start Date	End Date	
Reginald, David	General	2005-08-22		Remove
Dean, Steve	General	2005-08-22		Remove

Page(s): 1

To add a new affiliate to the list,

Perform a “Contact” search (Section 1.8.1) and if the contact is in the system, they will display.

Contact Search Results

CARIS ID	Contact Name	Birth Date	
PTHER-100000038	Theresa, Elizabeth	1902-04-12	View

Page(s): 1

[Advanced Search](#) [Create Contact](#)

If the person is NOT in the system, try their name spelled differently or perform an advanced search (Section 1.8.2). If they still don't show up, Create a New Contact as in Section 2.4.

Click “View”

Contact Details (Theresa, Elizabeth)

General			
Family Name:	Theresa	Given Name:	Elizabeth
Preferred Name:	Mother	Aliases:	...
Date of Birth:	12-Apr-02	Gender:	Female
Date of Death:	...		

[Address Book](#) [Relationships](#)

[Add to Case](#) [Relate to Client](#) [Relationships](#) [Address Book](#) [Edit Contact](#)

Click “Add to Case”

The “Add Case Affiliate” window will display.

Start Date: 3/24/2006 End Date:
Client Name: Michael Farrington Case Id: 20414
Member Name: Haugen, Jason Lee Role:
Alternate Care Giver
Emergency Contact
Legal Guardian
No Contact
Other
Primary Care Giver
Secondary Care Giver
Affiliate Cancel

Select the appropriate Start and End dates
Select a role from the drop down list
Click “Add Affiliate”

Members

Name	Case Access	Start Date	End Date	
One, Ann_3	Case Manager	2005-08-04		Remove
Huber, Anna-Maria	Case Worker	2005-08-08	2005-08-30	Remove

Page(s): 1

Affiliates

Name	Role	Start Date	End Date	
Reginald, David	General	2005-08-22		Remove
Dean, Steve	General	2005-08-22		Remove
Theresa, Elizabeth	General	2005-08-22	2005-10-07	Remove
Haugen, Jason Lee	Legal Guardian		2006-03-24	Remove

The new affiliate will display in the “Affiliates” list.

2.15 REMOVING AN AFFILIATE OR A MEMBER

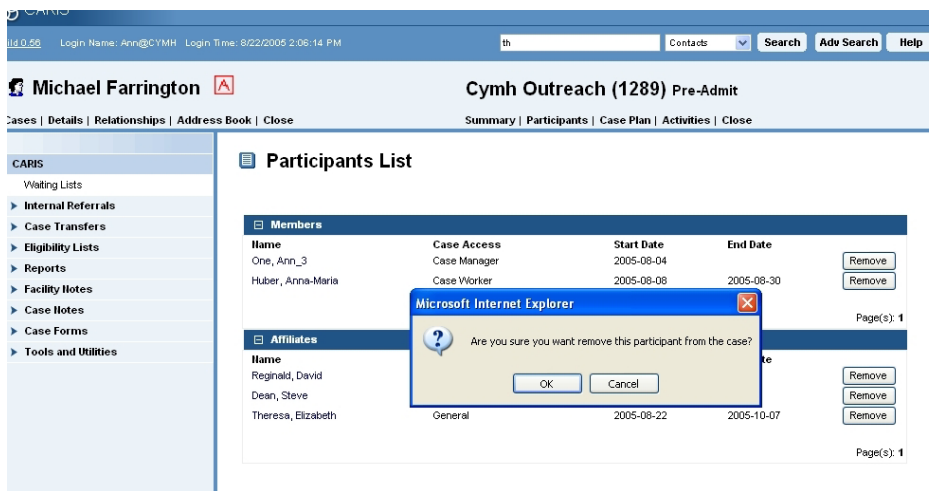
To remove an affiliate or a member from the Case list,

With the Client/Case in context,

Click on Participants

Click on “Remove” beside the person’s name.

A prompt will display asking if you really want to remove that person.



Click “OK”

The person will be removed from the list.

2.16 CREATING A NEW CASE (REFERRAL)

A client who has been entered into the system is considered a “person” until a Case has been created for him or her, at which time the person becomes a “client”.

To create a new case:

Bring the “person” into context (Section 2.2)



Click on “Cases”

A list of existing cases will display. In this case there are none.

Click on “New Referral” to start the process of creating a case.

The window that appears contains a series of fields. The effective date (which defaults to today’s date) must be entered, and a selection from each of the drop down lists must be selected. The notes field is optional. When you have selected the options,

Click “Create Referral”

The “Accept Referral” window will display. Check the “Case Information” in the Case context area to make sure it is correct, then,

Click “Accept Referral”

(If you wish to make a change, click “Cancel” and you will be returned to the “Create Case” window.)

Build 0.64 Login Name: Ann@CYMH Login Time: 8/4/2005 10:20:24 AM

Michael Farrington Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Members | Affiliates | Case Plan | Activities | Close

Case Summary

Case Type:	Cymh Outreach	Referral Date:	Aug-04-2005
Case Status:	Pre-Admit	Accept/Reject Date:	Aug-04-2005
Case Id:	1289	Admission Date:	...
Case Manager:	One, Ann_3	Est. Discharge Date:	...
Referral Source:	Self	Discharge Date:	...
Referral Mode:	Walk-in	Case Close Date:	...
Bed Information:	...		
Waitlist Information:	...		

Reject Referral Accept Referral Cancel Case Admit Discharge Close Case

The client is now in the pre-admit stage. You may leave the client there until you are ready to admit him or her at a future date, or admit (6) the client now.

NOTE: You may have found during the creation of this new case that the client is not suitable for the Case or Program that you were considering. If you decide not to continue with the case, you may “Cancel” (7) the case.

2.17 DISCHARGING A CLIENT

When you discharge a client, you effectively cease to work with the client on this case, but the case remains open and will appear on the client’s Case List, until you “Close the Case” (Section 2.18). This feature allows occasional client contact (eg. Consultations, phone calls) to be recorded on the client file when the client is no longer receiving regular services.

To discharge a client,

Place the client into context.

Open “Cases”

Select “View” for the case you wish to discharge him from.

Build 0.62 Login Name: training1@PSDHH Login Time: 8/26/2005 11:59:30 AM

Michael Farrington

Cases | Details | Relationships | Address Book | Close

Case List

Client Cases

Case Type	Case Status	My Case Role	Start Date	
Administration	Pre-Admit	Case Manager	2005-08-23	View
Community Development Administration	Active	Case Manager	2005-08-23	View
Consultative Services	Pre-Admit	Case Manager	2005-08-25	View
Deaf Access Office	Active	Case Manager	2005-08-23	View
Victory Hill Residential Program	Referral	Case Manager	2005-08-23	View

Page(s): 1

Other Client Cases

Affiliate Cases

The Case Summary will display.

CARIS

Login Name: Ann@PSDHH Login Time: 10/31/2005 11:53:51 AM michael Clients Search Adv Search Help

Michael Farrington (1022857) **VHRP (74880) Active**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Case Summary

Case Type:	VHRP	Referral Date:	Oct-31-2005
Case Status:	Active	Accept/Reject Date:	Oct-31-2005
Case Id:	74880	Admission Date:	Oct-31-2005
Case Manager:	Villeneuve, Ann	Est. Discharge Date:	Nov-23-2005
Referral Source:	Self	Discharge Date:	...
Referral Mode:	Walk-in	Case Close Date:	...
Phase Days:	0		
Bed Information:	...		
Waitlist Information:	...		
Referral Note:			

Reject Referral Accept Referral Cancel Case Admit **Discharge** Close Case

Click on "Discharge"

The Discharge Form will display.

CARIS

Login Name: Ann@PSDHH Login Time: 10/31/2005 11:53:51 AM michael Clients Search Adv Search Help

Michael Farrington (1022857) **VHRP (74880) Active**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Discharge Form

Date: 10/31/2005

Reason: Program Completed

Responsible Agent: Self

Discharge Note:

Summary of Services Received: personal guidance and consultation

Post-Service Recommendations: follow-up calls monthly

Save Cancel

Fill in the appropriate fields with the information required to validate the discharge.

Click "Save"

CARIS
 Login Name: Ann@PSDHH Login Time: 10/31/2005 11:53:51 AM michael Clients Search Adv Search Help

Michael Farrington (1022857) **VHRP (74880) Follow-up**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Case Summary

Case Type:	VHRP	Referral Date:	Oct-31-2005
Case Status:	Follow-up	Accept/Reject Date:	Oct-31-2005
Case Id:	74880	Admission Date:	Oct-31-2005
Case Manager:	Villeneuve, Ann	Est. Discharge Date:	Nov-23-2005
Referral Source:	Self	Discharge Date:	Oct-31-2005
Referral Mode:	Walk-in	Case Close Date:	...
Phase Days:	0		
Bed Information:	...		
Waitlist Information:	...		
Referral Note:			

Reject Referral Accept Referral Cancel Case Admit Discharge **Close Case**

The Case Summary now shows the discharge date.

2.18 CLOSING A CASE

Closing a Case means that you will no longer have any dealings with the client in relation to this particular case, nor will any affiliates or members. The Case will be closed and will no longer appear on the client's "Case List". You will be able to resurrect the case for reference purposes by selecting the "Closed Cases" filter in the client's "Case List".

CARIS
 Login Name: Ann@PSDHH Login Time: 10/31/2005 11:53:51 AM michael Clients Search Adv Search Help

Michael Farrington (1022857) **VHRP (74880) Follow-up**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Case Summary

Case Type:	VHRP	Referral Date:	Oct-31-2005
Case Status:	Follow-up	Accept/Reject Date:	Oct-31-2005
Case Id:	74880	Admission Date:	Oct-31-2005
Case Manager:	Villeneuve, Ann	Est. Discharge Date:	Nov-23-2005
Referral Source:	Self	Discharge Date:	Oct-31-2005
Referral Mode:	Walk-in	Case Close Date:	...
Phase Days:	0		
Bed Information:	...		
Waitlist Information:	...		
Referral Note:			

Reject Referral Accept Referral Cancel Case Admit Discharge **Close Case**

Click on "Close Case"

The "Close Case" window will display.

CARIS

Login Name: Ann@PSDHH Login Time: 10/31/2005 11:59:51 AM

michael Clients Search Adv Search Help

Michael Farrington (1022857) **VHRP (74880) Follow-up**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Close Case

Effective Date: 10/31/2005

Reason for Closure: Completed

Close Case Cancel

Select the effective date for closing the case
 Select a reason from the drop down list
 Click “Close Case”

The Case Summary will display with the date and reason shown and no other options available. The Case is closed.

CARIS

Login Name: Ann@PSDHH Login Time: 10/31/2005 11:59:51 AM

michael Clients Search Adv Search Help

Michael Farrington (1022857) **VHRP (74880) Closed**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Case Summary

Case Type:	VHRP	Referral Date:	Oct-31-2005
Case Status:	Closed	Accept/Reject Date:	Oct-31-2005
Case Id:	74880	Admission Date:	Oct-31-2005
Case Manager:	Villeneuve, Ann	Est. Discharge Date:	Nov-23-2005
Referral Source:	Self	Discharge Date:	Oct-31-2005
Referral Mode:	Walk-in	Case Close Date:	Oct-31-2005
Phase Days:	0		
Bed Information:	...		
Waitlist Information:	...		
Referral Note:			

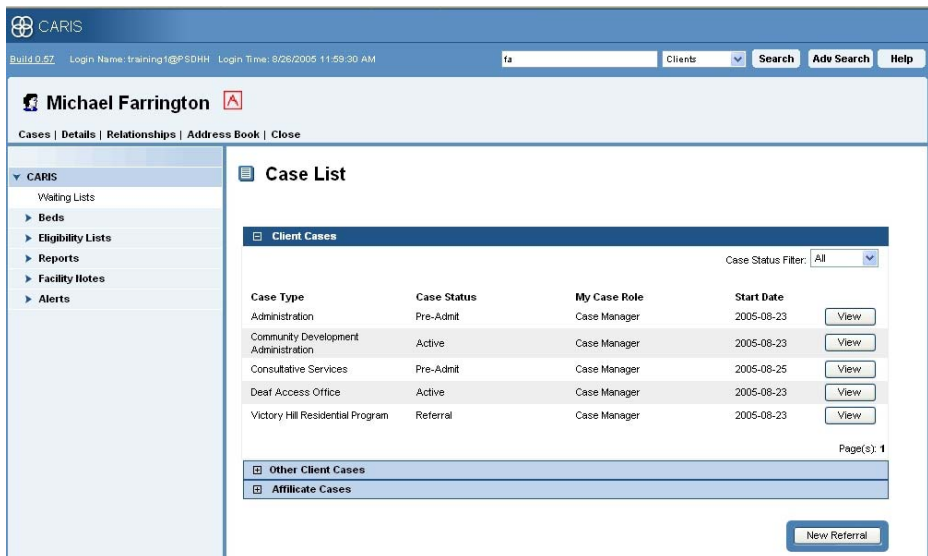
Reject Referral Accept Referral Cancel Case Admit Discharge Close Case

2.19 FINDING AN EXISTING CASE

Cases are always attached to a specific client. To find a case, you must know the client's name, or be able to locate the client through the various search methods (Section 1.8)

Once the client is “In Context”,

Click on “Cases”



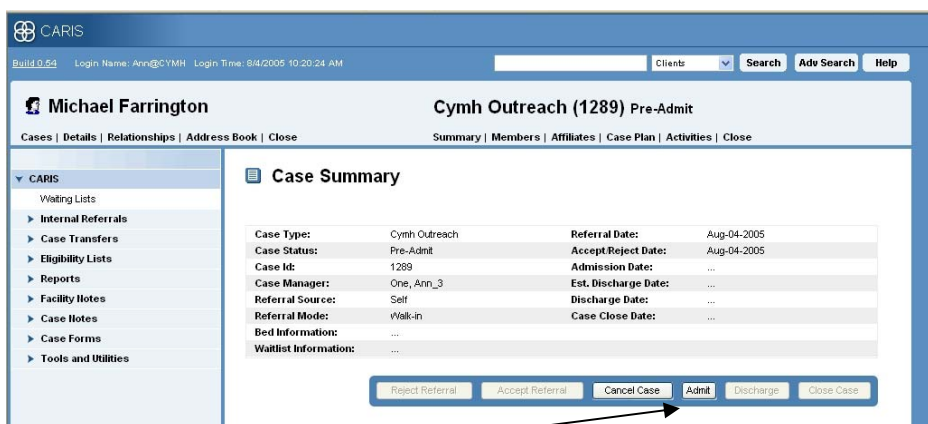
The client's Case List will display and you can then view the case details. When you click "View", the case comes into context also.

2.20 ADMITTING A CLIENT

You can create a case for a client and continue to prepare the paperwork, or investigate the client's suitability for a program, wait until a clinician has time to see the client, or just wait for the client to decide to work with you. This is the "Pre-admit" phase, where you are both getting ready to make a commitment to proceed. Once you "Admit" a client, you are now in the active phase of a client/case worker context with all the implications of that status.

To admit a client to a case,

Select the appropriate case from the client's case list and open it by clicking on "View"



Click "Admit"

Michael Farrington Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close

Summary | Members | Affiliates | Case Plan | Activities | Close

Admission Detail

Effective Date: 2005-Aug-04

Est Discharge Date:

Calendar: August 2005

Today: 8/4/2005

Clear Date

Admit Cancel

The effective date will be today, and you can select the estimated discharge date, or leave it blank.

Select the appropriate dates
Click “Admit”

2.21 ADDING A MEMBER TO A CASE

A Member is a person who has access to the case files and who is actively involved in the case. You can appoint a member to one of your cases from the list of members only if you are the Case Manager. The person who creates the Case (usually the Intake Clinician) is automatically assigned the role of Case Manager. He or she will be able to assign the role to the appropriate clinician when one is determined.

To add a member to your case,

Bring the client and case into context

Perform a Search for the member you wish to add to the case.

Jason Marceau Victory Hill Residential Program (8092) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

Member Search Results

Member Name	Organization	
Anthony, Marc	DFSP	View
Clinician, Marion	PA	View
Huber, Anna-Maria	CYMH	View
Hustwick, Barb	MAC	View
Marceau, Jason	DFSP	View
Macdonald, Andy	MAC	View
One, Ann	mac	View

Page(s) 1

Select the member you want from the list and click “View”

Member Details (Andy Macdonald)

First Name:	Andy	Last Name:	Macdonald
Phone (H):	...	Organization:	MAC
Phone (W):	...	Fax:	...
Phone (M):	...	Email:	...
Phone (E):	...		

[Add to Case](#)

If you are sure this is the right member,

Click on “Add to Case”

Choose the appropriate “Role” from the drop down list.

Assign Case Member

Start Date	8/26/2005	EndDate	
Client Name	Marceau, Jason	Case Id	8092
Member Name	Andy Macdonald	Role	Case Worker

[Assign Case Member](#) [Cancel](#)

Both the Start and End dates can be determined by using the pull down calendars. The start date will default to today’s date. The member’s role must be selected.

Click on “Assign Case Member”.

The member will now be included in the Participants List as a “Case Worker” (in this example)

Participants List

Name	Case Access	Start Date	End Date	
One, Ann_2	Case Manager	2005-08-22		Remove
Macdonald, Andy	Case Worker	2005-08-26		Remove

Page(s): 1

Name	Role	Start Date	End Date
------	------	------------	----------

Page(s): 1

2.22 DEVELOPING A CASE PLAN

The term “Case Plan” as used in this system refers to the “Goals and Objectives” set by the Case Manager (and probably Case Members) and the Client for the particular “Case” that is “In Context”.

2.22.1 CREATING A GOAL

The “Goal” is the broad conclusion to the Case that the Plan is aimed at achieving. To Create the Goal, bring the Client and the Case into “Context”.

Click on “Case Plan”

The screenshot shows the CARIS Case Plan interface for Michael Farrington. The left sidebar contains a navigation menu with options like Waiting Lists, Beds, Internal Referrals, Case Transfers, Eligibility Lists, Reports, Facility Notes, Case Notes, Case Forms, and Tools and Utilities. The main content area is titled "Cymh Outreach (1289) Active" and shows a "Goals and Objectives" section with a message "No Goals and Objectives". A "Create Goal" button is visible in the bottom right corner of the main content area. An arrow points from the "Case Plan" link in the top navigation bar to the "Create Goal" button.

Any existing Goals will be displayed. In this case there are none because this is a new case and none have been set.

Click “Create Goal”

Select a goal from the drop down list, or select “User Defined Goal” and type in a goal in the text box..

The screenshot shows the "Create Goal" form in the CARIS system. The form includes fields for Goal (User Defined Goal), User Defined Title (Help him find a Job), Priority (Priority 1), Status (Active), Critical Date (9/13/2005), Start Date (9/13/2005), End Date, and Note (Michael needs a job right away, to pay his rent). There are "Save" and "Cancel" buttons at the bottom right. An arrow points from the "Create Goal" button in the previous screenshot to this form.

Click “Save” and the Goal will be saved and will also become “Active”.

Note that until it is saved, the “Status” is *grayed out*.

The Goal will now be displayed in the Case Plan “Goals and Objectives” window.

CARIS
Build 0.57 Login Name: Ann@CYMH Login Time: 9/13/2005 3:12:44 PM

Michael Farrington

Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

Goals and Objectives

GOAL: Help him find a job

Goal Details:

Priority:	PRIORITY_1	Status:	Active
Critical Date:	2005-09-12		
Start Date:	2005-09-12	End Date:	
Note:	Michael needs a job right away to pay his rent		

Page(s): 1

Create Objective

Create Goal

2.22.2 CREATING AN OBJECTIVE

When a Goal has been defined and saved, you will need to define one or more objectives designed to achieve the set Goal. With the “Goals and Objectives: window open:

Click on “Create Objective”

CARIS
Build 0.57 Login Name: Ann@CYMH Login Time: 9/13/2005 3:12:44 PM

Michael Farrington

Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

Create Objective

Goal: Help him find a job

Objective: <User Defined Objective>

User Defined Title: Help him retain his own apartment

Priority: Priority 1 Status: Pending

Critical Date: 9/13/2005 Approach: Psychological

Start Date: 9/13/2005 End Date:

Note: He needs to keep his apartment where he has lived for three years and where he feels safe.

Save Cancel

Select the appropriate items from the Drop Down List, or select User Defined Objective and type an objective into the text box, and then add whatever Notes are needed to explain the objective(s).

You can have several objectives for a given Goal, but you have to create each one separately.

The Objective will now be added to the Goal in the “Goals and Objectives” window.

CARIS
Build 0.57 Login Name: Ann@CYMH Login Time: 9/13/2005 3:12:44 PM

Michael Farrington **Cymh Outreach (1289) Active**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Goals and Objectives

GOAL: Help him find a job

Goal Details:

Priority:	PRIORITY_1	Status:	Active
Critical Date:	2005-09-12		
Start Date:	2005-09-12	End Date:	
Note:	Michael needs a job right away to pay his rent		

OBJECTIVE: Help him retain his own apartment [In-Progress]

Objective Details:

Priority:	PRIORITY_1	Status:	Pending Activity
Critical Date:	2005-09-13	Approach:	Psychological
Start Date:	2005-09-13	End Date:	
Note:	He needs to keep his apartment where he has lived for three years and where he feels safe.		

Page(s): 1

Create Goal

2.22.3 CREATING AN ACTION

Now that you have established the Goals and Objectives for the client, you can decide on what Action(s) to take to first achieve the Objective(s), which should then result in the achievement of the Goal(s).

With the Goals and Objectives window open:

Click on “Create Action”

(You will note that this button is in the “Objectives” part of the display. You can’t generate an Action until you have decided on an Objective.)

CARIS
Build 0.57 Login Name: Ann@CYMH Login Time: 9/13/2005 3:12:44 PM

Michael Farrington **Cymh Outreach (1289) Active**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Create Action

Objective: Help him retain his own apartment

Action: Help him write his resume by the 15th.

Priority: Priority 1 Status: Active

Critical Date: 9/13/2005 End Date: 9/15/2005

Note:

Save Cancel

Fill in the appropriate fields and select the appropriate items from the Drop Down Lists. “Action” is always a text entry.
Type in any Actions.
Add a Note if necessary
Click “Save”

The Action will be appended to the Goals and Objectives list.

Goals and Objectives

GOAL: Youth Placement [In-Progress]

Goal Details: Edit Delete Create Objective

Priority: PRIORITY_1 Status: Active

Critical Date: 2005-09-12

Start Date: 2005-09-12 End Date:

Note: Michael needs a job right away to pay his rent

OBJECTIVE: Help him retain his own apartment [In-Progress] Edit Delete Create Action

Priority: PRIORITY_1 Status: Pending Activity

Critical Date: 2005-09-13 Approach: Psychological

Start Date: 2005-09-13 End Date:

Note: He needs to keep his apartment where he has lived for three years and where he feels safe.

- ACTION:** Help him write his resume by the 15th. Edit Delete

Priority: PRIORITY_1 Status: Active

Start Date: 2005-09-13 End Date: 2005-09-15

Page(s): 1

Create Goal

To achieve the Objective you will probably need to take other Actions.

Click on “Create Action” again.

Create Action

Objective: Help him retain his own apartment

Action: Arrange an interview at *Job Search Ltd. with Fred Bloggs.

Priority: Priority 2 Status: Active

Critical Date: 9/13/2005 End Date: 9/17/2005

Note: Interview as soon as he has his resume done.

Save Cancel

Fill in the fields and make the Drop Down List selections.
Click “Save”

The new Action will be added to the “Objective” in the “Goals and Objectives” window.

CARIS
Build 0.57 Login Name: Ann@CYMH Login Time: 9/13/2005 3:12:44 PM

Michael Farrington Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

Goals and Objectives

GOAL: Youth Placement [In-Progress]

Goal Details: Edit Delete Create Objective

Priority: PRIORITY_1 Status: Active
Critical Date: 2005-09-12
Start Date: 2005-09-12 End Date:
Note: Michael needs a job right away to pay his rent

OBJECTIVE: Help him retain his own apartment [In-Progress] Edit Delete Create Action

Priority: PRIORITY_1 Status: Pending Activity
Critical Date: 2005-09-13 Approach: Psychological
Start Date: 2005-09-13 End Date:
Note: He needs to keep his apartment where he has lived for three years and where he feels safe.

- ACTION: Help him write his resume by the 15th.** Edit Delete
- ACTION: Arrange an interview at "Job Search Ltd." with Fred Bloggs.** Edit Delete

Page(s): 1

Create Goal

2.23 GENERATING THE CASE HISTORY

The “Activities” list is the Case History. You can view the Case specific “Activities” list at any time that the particular Case is “In Context”.

With the Client and Case “In Context”:

Click “Activities”

CARIS
Build 0.57 Login Name: Ann@CYMH Login Time: 9/13/2005 3:12:44 PM

Michael Farrington Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

Activities Display

Activity Filter: All Activities

- Admitted by Ann (2005-08-25 15:34)
- Medication Intervention
- Medication Intervention
- Medication Intervention
- Case Affiliate Update by Ann (2005-08-22 15:00)
- Client-Based Consultation by Ann (2005-08-22 14:28) Edit
- Case Affiliate Update by Ann (2005-08-22 14:23)
- Case Affiliate Update by Ann (2005-08-22 14:24)
- Record Correspondence Log Event by Ann (2005-08-22 13:56) Edit
- Case Member Update by Ann (2005-08-08 15:42:52.17)
- Client Alert by Ann (2005-08-05 13:38:05.91)
- Accepted by Ann (2005-08-04 10:27:44.70)

Each of the listed Activities can be expanded to view the details by clicking on the “+” sign beside the activity.

The Activity filter allows you to just view those activities that you are interested in, rather than the complete “History”. It also allows you to search during a specific time frame rather than for the entire period the Case has been open. This feature is useful when you have recorded many activities over a long period of time.

3 Functions

This Section will contain a description of each individual function, or window. These functions are usually found in the “Navigation Tree”.

3.1 ELIGIBILITY LIST MANAGEMENT

The Eligibility List is a record of activities and programs involving your Clients or other Clients. If you are authorized to do so, you can generate new activities or programs and add them to the list, and you can edit, delete, or complete existing ones. You can place your Client, and/or any Case Affiliates on any activity or program that is listed subject to acceptance by the activity or program coordinator.

The Status Filter allows you to select only the Lists you are interested in – “All” “Active” or “Completed”.

3.1.1 ADDING A NEW ELIGIBILITY LIST.

You do not have to have a Client or Case “In Context” to view the complete Eligibility List, and having either In Context will not affect the List display.

Expand the Eligibility List by clicking on the “►”.
Click on Management

Build 0.57 Login Name: Ann@CYMH Login Time: 9/19/2005 2:38:36 PM

Michael Farrington

Cases | Details | Relationships | Address Book | Close

Eligibility List Management

Status Filter: Active

List Name	Start Date	End Date	Min	Max	Status	Notes
Computer Literacy	2005-08-02	2005-08-03	5	20	Active	Edit Delete Complete
List	2005-07-15	2005-07-22	2	8	Active	Edit Delete Complete

Page(s): 1


[Add List](#)

To add a new program or activity to the list, *if you are authorized to do so*:

Click on “Add List”

A form will display containing fields for you to describe the activity or program offered.

CARIS
Build 0.57 Login Name: Ann@CYMH Login Time: 9/19/2005 2:36:36 PM fa Clients Search Adv Search Help

Michael Farrington  **Cymh Outreach (1289) Active**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Create Eligibility List

List Name:

Start Date: End Date:

Minimum Participants: Maximum Participants:


List Description:

Save Cancel

Fill in the fields using the Drop Down Lists and text fields.

Some fields are mandatory, and a prompt will display if these fields are not completed prior to clicking “Save”

CARIS
Build 0.57 Login Name: Ann@CYMH Login Time: 9/19/2005 2:36:36 PM fa Clients Search Adv Search Help

Michael Farrington  **Cymh Outreach (1289) Active**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Create Eligibility List

List Name:

Start Date: End Date:


Minimum Participants: Maximum Participants:

List Description:

Save Cancel

5) Click “Save”










CARIS
Build 0.57 Login Name: Ann@CYMH Login Time: 9/19/2005 2:36:36 PM fa Clients Search Adv Search Help

Michael Farrington  **Cymh Outreach (1289) Active**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Eligibility List Management

Status Filter: Active

List Name	Start Date	End Date	Min	Max	Status	Notes
Computer Literacy	2005-08-02	2005-08-03	5	20	Active	  
List	2005-07-15	2005-07-22	2	8	Active	  
Mental Aerobics	2005-09-07	2006-03-07	4	15	Active	  

Page(s): 1

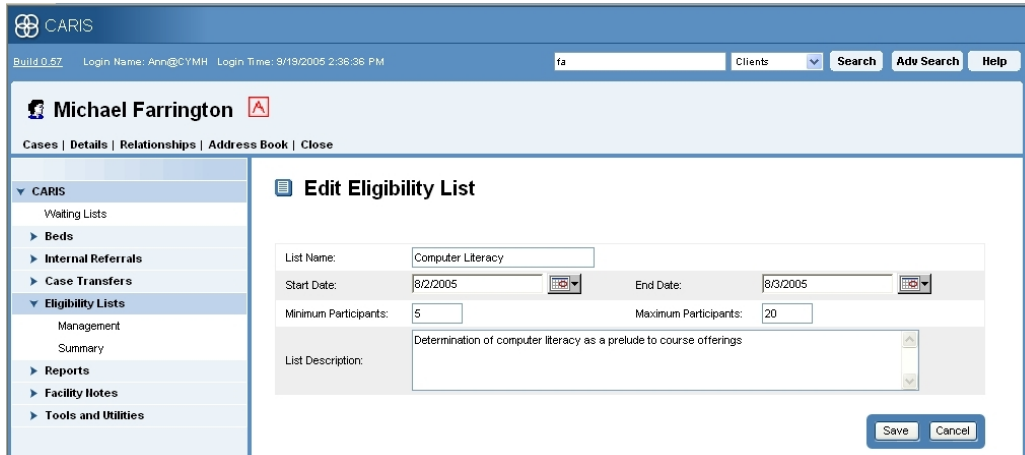
Add List

The new program or activity has been added.

3.1.2 EDITING AN ELIGIBILITY LIST

To make changes to a List, if you are authorized to do so:

Open the Eligibility list Management window
Select the List you wish to edit
Click on “Edit”.



You can now make changes to the List.

NOTE: If you are NOT authorized to create, edit, delete or complete Eligibility lists. The option buttons will be *grayed out*, and you won't be able to open the windows.

3.1.3 DELETING AN ELIGIBILITY LIST

If, for any reason - such as insufficient participants, you wish to delete a List, *if you are authorized to do so*:

Open the Eligibility list Management window-
Select the List you wish to delete
Click on “Delete”.

The list will be deleted and will not show up on the display even when the “All” option is selected in the Status Filter.

3.1.4 COMPLETING AN ELIGIBILITY LIST.

Completing a List means that you – *if you are authorized to do so* – are satisfied that the participation level is acceptable and you are closing the List to further participants and proceeding with the activity or program.

To complete a List:

Open the Eligibility list Management window
Select the List you wish to complete.

6) Click on “Complete”.

Complete Eligibility List

Details

Eligibility List Name: Computer Literacy

Start Date: 2005-08-02 End Date: 2005-08-03

Minimum Participants: 5 Maximum Participants: 20

Participants

Enroll	Name	Priority	Date Added
1 <input type="checkbox"/>	Farrington, Michael	1	2005-09-19

Page(s): 1

Complete List **Cancel**

The display will indicate the status of the List and provide details of the participants.

If you are satisfied with the number of participants and wish to continue with the activity:

Click “Complete List”

A prompt will display asking if you want to “complete” the List.



Click “OK”.

The activity will be removed from the “Active” list and will only be included if you select “All” or “Completed” in the Status Filter.

3.1.5 ELIGIBILITY LIST SUMMARY

The Summary displays all the Lists that are either “Active” or “Completed”, depending on the Status Filter selection.

CARIS
Build 0.57 Login Name: Ann@CYMH Login Time: 9/19/2005 2:36:36 PM

Michael Farrington Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Eligibility List Summary

Status Filter: All

List Name	Start Date	End Date	Min	Max	Status	Notes
Computer Literacy	2005-08-02	2005-08-03	5	20	Complete	View
Computer Literacy	2005-08-02	2005-08-03	5	20	Active	View
List	2005-07-15	2005-07-22	2	8	Complete	View
List	2005-07-15	2005-07-22	2	8	Active	View
Mental Aerobics	2005-09-07	2006-03-07	4	15	Active	View

Page(s): 1

You can view the details of any List.

Select the List you wish to have a look at, and:
Click on “View”

CARIS
Build 0.57 Login Name: Ann@CYMH Login Time: 9/19/2005 2:36:36 PM

Michael Farrington Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

View Eligibility List

List Name: Computer Literacy

Start Date: 2005-08-02 End Date: 2005-08-03

Minimum Participants: 5 Maximum Participants: 20

Current Participants: 0

List Description: Determination of Computer Literacy as a prelude to course offerings

Participant Name	Priority	Case #	Date Added
------------------	----------	--------	------------

Page(s): 1

Add Participant Cancel

3.1.6 ADDING A PARTICIPANT TO AN ELIGIBILITY LIST.

From the “Eligibility List Summary window (Section 3.1.5)

Click on “Add Participant”.

NOTE: You must have a Client and Case “In Context” to be able to add a participant.

You may select the Client or any Affiliate to participate in the program or activity, and you may designate a priority for that participation.

Once you have made your selection:

Click “Save”

The person will be added to the List and you may then add another Participant if you wish.

You may also change the Priority of a Participant:

Click on “Edit”

Change the “Priority”
“Save”

3.2 REPORTS

The system provides the capability to generate both Ad Hoc and Case Specific reports.

3.2.1 AD HOC REPORTS

The system provides a method for producing Ad Hoc reports based on a number of filter elements. By selecting the elements you need for the report from the drop down lists, a report which contains only the selected elements will be generated.

To generate an Ad Hoc report:

Click on “Ad Hoc Report” under the “Reports” heading on the navigation tree.

The screenshot shows the CARIS web application interface. On the left is a navigation tree with categories: CARIS, Beds, Eligibility Lists, Reports, and Facility Notes. The 'Reports' category is expanded, showing 'Ad Hoc Report' and 'Case Report'. The 'Ad Hoc Report' option is selected. The main content area displays the 'Ad Hoc Report' form. The form has several filter sections: 'Administrator Filter' (Report Type: Client), 'Demographics Filter' (Gender: Male, Minimum Age: 12, Maximum Age:), 'Extended Demographics Filter' (Aboriginal Origin: Non-aboriginal, Ethno-cultural Background: , Education Level: , Vocational Status: , Employment Status: , Status in Canada: , Guardianship Status: , Religious Practice: , Household Composition: , Primary Living Arrangement: , Preferred Language: , Lang Spoken at Home:), 'Locations Filter' (City: , Province: , Postal Code: , Country:), and 'Activities Filter' (Activity Types: a list of activities including Accept Activity, Activity Participant and Role, Admission, Alert Client, Appointment, Bed Reservation, Cancel Activity, Case Document, Case Referral). At the bottom, there are date pickers for 'Start Date' (7/26/2005) and 'End Date' (8/26/2005), and a 'Return Cost' checkbox. 'Submit' and 'Cancel' buttons are at the bottom right.

The Report form will display.

Select the criteria (filters) that you require for your report
Click “Submit”

The results will display as a report.

within thirty days following the estimated date of the event you wish to view. Following is an example of recording an administrative event.

3.3.1 CREATING AN ANNOUNCEMENT

An announcement is a message intended for everyone at a given location or agency. This is typically an administrative function to enable administrators to notify staff of impending events or other useful information, others in the location may have the option of creating announcements too.

Announcements show up automatically on the main page of each user upon log-in.

The screenshot shows the CARIS main page. On the left is a navigation menu with categories: CARIS, Beds, Eligibility Lists, Reports, and Facility Notes. The Facility Notes sub-menu is expanded, showing options like Administrative Log, Announcement, Facility Incident Report, Safety Procedure, and Topic-Based Consultation. The main content area is titled 'Welcome Ann@PSDHH' and 'Announcements'. It features a table with columns: Date, Subject, Importance, and Detail. The table contains two entries: one from 2005-07-13 about a summer vacation and another from 2005-09-01 about a meeting. Each entry has a 'Delete' button. A 'Time Filter' dropdown is set to 'Last 2 Month' with an 'Add' button next to it. The page number 'Page(s): 1' is at the bottom right.

Date	Subject	Importance	Detail
2005-07-13	Happy summer vacation!	Medium	See you August 30 and 31 for followup CARIS orientation.
2005-09-01	Meeting	High	Meeting with MF and parents with constable Jackson

1)

To add an announcement to the list:

Click "Add" on your Main Page.

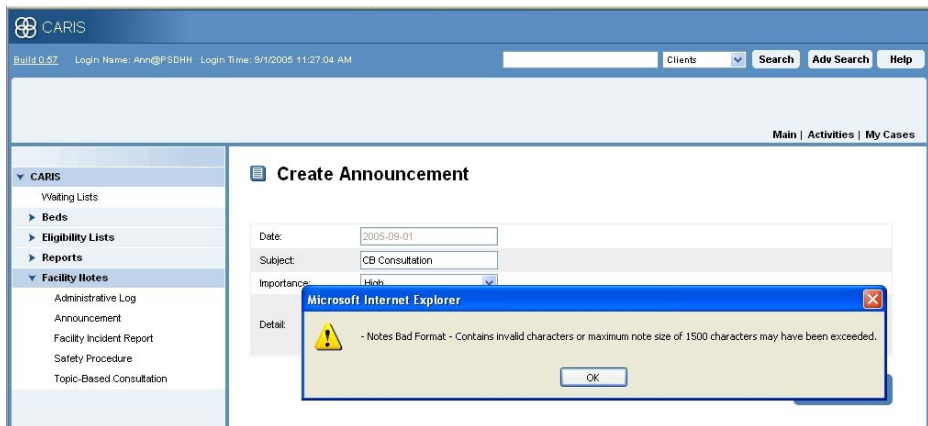
The screenshot shows the 'Create Announcement' window. It has a form with fields for Date (set to 2005-09-01), Subject (TB Consultations), Importance (set to High), and Detail (a text area with a placeholder message). There are 'Save' and 'Cancel' buttons at the bottom right.

Date: 2005-09-01
Subject: TB Consultations
Importance: High
Detail: Please ensure that you enter the "End Date" correctly when recording a Topic Based Consultation.

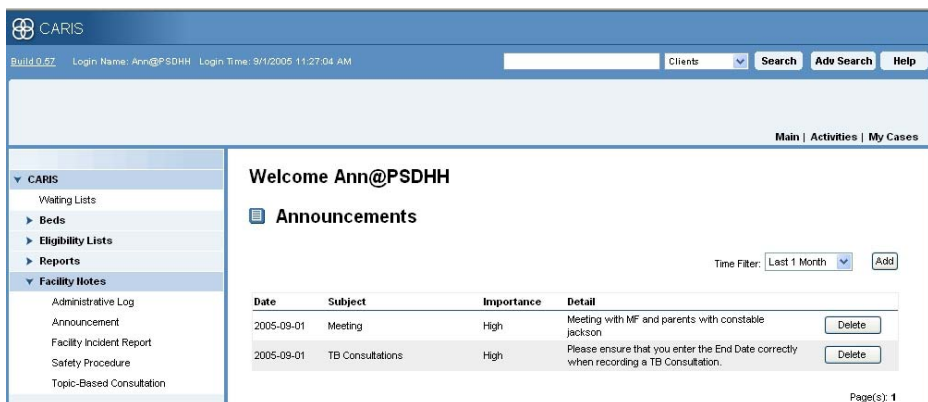
The Create Announcement window always shows today's date.

Fill in the subject and importance fields
Add your announcement
Click Save

If you see this prompt:



Check the way you have written your details. The system doesn't like odd characters and symbols, so sometime it will reject them. In this case it doesn't like the "Quotes" around "End Date". Remove them and your announcement is accepted.



Your announcement shows up on everyone's Main Page.

3.3.2 DELETING AN ANNOUNCEMENT

Deleted messages disappear from everyone's Main Page, so be careful before you delete an Announcement.

If you are authorized to delete announcements, the "Delete" button will be active. If you are not authorized to perform this action, the button will be *grayed out*.

To delete an announcement:

Click "delete" for that particular announcement.

The announcement will disappear.

3.3.3 LOGGING A COMMUNICATION NOTE

Various events occurring in the agency require logging for future reference. The business practices of the agency will indicate which events require logging. To log an event:

Open "Communication Notes" under the "Organization Notes" heading in the navigation tree.

You will see a list of logged communication notes.

YFV CARIS

Login Name: Ann@YFV Login Time: 9/22/2005 2:22:43 PM

mar Clients Search Adv Search Help

Main | Activities | My Cases

YFV CARIS

- Waiting Lists
- Beds
- Eligibility Lists
- Internal Referrals
- Case Transfers
- Reports
- Organization Notes
 - Communication Notes
 - Announcement
 - Facility Incident Report
 - Safety Procedure
 - Topic-Based Consultation
- External Services
- Tools and Utilities

Communication Notes

Time Filter: 4 Weeks

Date	Type	Method	Duration	Notes
2005-09-21	Referral	Email	Unknown Status	Edit
2005-09-21	Advocacy	Walk-in	Unknown Status	Edit
2005-09-21	Referral	Phone	Unknown Status	Edit
2005-09-21	Service Request	Walk-in	Unknown Status	Edit
2005-09-14	Advocacy	Fax	5 mins	Edit
2005-09-12	Education	Mail/Courier	60 mins	Edit
2005-09-08	Advocacy	Phone	50 mins	Edit
2005-08-30	Referral	Email	5 mins	Edit

Page(s): 1

Add Note Cancel

Click on “Add Note”

While this feature is used primarily to log phone calls and other forms of communication, it can be used to record other events in the “Notes” portion of the form.

YFV CARIS

Login Name: Ann@YFV Login Time: 9/22/2005 2:22:43 PM

mar Clients Search Adv Search Help

Main | Activities | My Cases

YFV CARIS

- Waiting Lists
- Beds
- Eligibility Lists
- Internal Referrals
- Case Transfers
- Reports
- Organization Notes
 - Communication Notes
 - Announcement
 - Facility Incident Report
 - Safety Procedure
 - Topic-Based Consultation
- External Services
- Tools and Utilities

Create Communication Note

Date: 9/22/2005

Type: Information

Contact Method: Phone

Duration (minutes): 15

Notes: Wednesday's meeting is at 2:00p.m. instead of 1:30 p.m.

Save Cancel

Make the appropriate selections from the Drop Down Lists and add a Note describing the event.
Click “Save”.

The event will then be recorded and displayed on the Communication Notes page for 30 days. At the end of 30 days it will disappear off the page but can be retrieved for viewing by using the Time Filter to select a date within thirty days following the event.

3.3.4 LOGGING TELEPHONE CALLS, FAXES, E-MAILS.

To record general communications such as telephone calls, faxes and e-mails,

Expand the “Organization Notes” section on the Navigation Tree.

1)

The screenshot shows the CARIS web application interface. The top navigation bar includes the CARIS logo, login information (Ann@YFV), and search options. The left navigation tree is expanded, showing 'Organization Notes' as a sub-item under 'YFV CARIS'. An arrow points to this link. The main content area displays a 'Welcome Ann@YFV' message and an 'Announcements' section with a table of recent announcements.

Date	Subject	Importance	Detail	
2005-08-30	t1	High	zxcv	Delete
2005-08-30	test	High	zxcv	Delete
2005-08-30	thytyh	High	thytyh	Delete
2005-09-01	tgrtgrt	Medium	rtgrtgrt	Delete
2005-09-16	sdf	High	sdf	Delete

Click on “Communication Notes”

The Communication Notes window will display.

The screenshot shows the 'Communication Notes' section of the CARIS interface. The left navigation tree is expanded, showing 'Communication Notes' as a sub-item under 'Organization Notes'. The main content area displays a table of communication notes. An arrow points to the 'Add Note' button at the bottom right of the table.

Date	Type	Method	Duration	Notes	
2005-09-21	Referral	Email	Unknown Status		Edit
2005-09-21	Advocacy	Walk-in	Unknown Status		Edit
2005-09-21	Referral	Phone	Unknown Status		Edit
2005-09-21	Service Request	Walk-in	Unknown Status		Edit
2005-09-14	Advocacy	Fax	5 mins		Edit
2005-09-12	Education	Mail/Courier	60 mins		Edit
2005-09-08	Advocacy	Phone	50 mins		Edit
2005-08-30	Referral	Email	5 mins		Edit

To record a new phone call, fax or e-mail,

Click on “Add Note”

CARIS

Login Name: Ann@YFV Login Time: 9/22/2005 2:22:43 PM

mar Clients Search Adv Search Help

Jason Marceau

Program C (39147) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

YFV CARIS

- Waiting Lists
- Beds
- Eligibility Lists
- Internal Referrals
- Case Transfers
- Reports
- Organization Notes
 - Communication Notes
 - Announcement
 - Facility Incident Report
 - Safety Procedure
 - Topic-Based Consultation
- Client Forms

Create Communication Note

Date: 9/22/2005

Type: Service Request

Contact Method:

Duration (minutes):

Notes:

Save Cancel

Today's date will automatically default to the date line, but, if you have hand recorded calls from an earlier date, and you wish to record them, you can select the appropriate date from the drop down calendar.

Select the type of communication from the drop down list.

CARIS

Login Name: Ann@YFV Login Time: 9/22/2005 2:22:43 PM

mar Clients Search Adv Search Help

Jason Marceau

Program C (39147) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

YFV CARIS

- Waiting Lists
- Beds
- Eligibility Lists
- Internal Referrals
- Case Transfers
- Reports
- Organization Notes
 - Communication Notes
 - Announcement
 - Facility Incident Report
 - Safety Procedure
 - Topic-Based Consultation
- Client Forms

Create Communication Note

Date: 9/22/2005

Type: Service Request

Contact Method: Email

Duration (minutes):

Notes:

Save Cancel

Then select the "Contact Method".

CARIS

Login Name: Ann@YFV Login Time: 9/22/2005 2:22:43 PM

mar Clients Search Adv Search Help

Jason Marceau

Program C (39147) Active

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

YFV CARIS

- Waiting Lists
- Beds
- Eligibility Lists
- Internal Referrals
- Case Transfers
- Reports
- Organization Notes
 - Communication Notes
 - Announcement
 - Facility Incident Report
 - Safety Procedure
 - Topic-Based Consultation
- Client Forms

Create Communication Note

Date: 9/22/2005

Type: Service Request

Contact Method: Email

Duration (minutes): 25

Notes:

Save Cancel

Then the "Duration" of the event.

The screenshot shows the CARIS software interface. At the top, the login name is 'Ann@YFV' and the login time is '9/22/2005 2:22:43 PM'. The user is logged in as 'Jason Marceau'. The main title is 'Program C (39147) Active'. Below the title, there are tabs for 'Cases', 'Details', 'Relationships', 'Address Book', and 'Close'. The left sidebar shows a tree view with 'YFV CARIS' expanded, containing 'Waiting Lists', 'Beds', 'Eligibility Lists', 'Internal Referrals', 'Case Transfers', 'Reports', and 'Organization Notes'. The 'Organization Notes' section is selected, showing a list of note types: 'Communication Notes', 'Announcement', 'Facility Incident Report', 'Safety Procedure', and 'Topic-Based Consultation'. The main content area is titled 'Create Communication Note' and contains a form with the following fields: 'Date' (9/22/2005), 'Type' (Service Request), 'Contact Method' (Email), 'Duration (minutes)' (25), and 'Notes' (Basil will be unable to attend the Friday meeting, his mother is ill). There are 'Save' and 'Cancel' buttons at the bottom right of the form.

Add whatever notes you wish.

If you wish to append an e-mail to the record for future reference, you can:

Open the e-mail

Select "All" and "Copy" to obtain the body of the e-mail and the address and details of the sender.

Paste it into the "Notes" section of the Communication Notes above.

Click "Save".

A prompt will display asking if you are sure you wish to Save this event.




Click "OK" and it will be saved and recorded in your "Communication Notes".

CARIS

Login Name: Ann@YFV Login Time: 9/22/2005 2:22:43 PM





















mar Clients Search Adv Search Help

Jason Marceau  **Program C (39147) Active**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Communication Notes

Time Filter: 4 Weeks

Date	Type	Method	Duration	Notes
2005-09-22	Information	Phone	15 mins	 
2005-09-22	Service Request	Email	25 mins	 
2005-09-21	Referral	Email	Unknown Status	 
2005-09-21	Advocacy	Walk-in	Unknown Status	 
2005-09-21	Referral	Phone	Unknown Status	 
2005-09-21	Service Request	Walk-in	Unknown Status	 
2005-09-14	Advocacy	Fax	5 mins	 
2005-09-12	Education	Mail/Courier	60 mins	 
2005-09-08	Advocacy	Phone	50 mins	 
2005-08-30	Referral	Email	5 mins	 

Page(s): 1

Add Note Cancel

3.3.5 RECORDING A SAFETY EVENT (FIRE, SMOKE, TEST)

To record a safety incident or event:

Click on “Safety Procedure” in the navigation tree under “Organization Notes”.
Fill in the appropriate fields, using the drop down list to identify the type of event.

CARIS

Build 9.55 Login Name: Ann@CYMH Login Time: 9/19/2005 10:46:20 AM

far Clients Search Adv Search Help


Main | Activities | My Cases

Safety Procedure

Date: 8/22/2005 Time: 12:00 AM

Procedure Type: Smoke Detectors

Notes: Small fire in washroom caused by cigarette in waste basket

Add Attachment:  Browse... Add Detach

Fire Report.doc (29KB)

Submit Cancel

Add an attachment if available
Submit

The incident will be recorded in the “Activities” file.

3.3.6 LOGGING A TOPIC BASED CONSULTATION

A Topic Based Consultation is an event during which two or more people discuss or consult together about a specific subject, or topic that may be clinical but does not have to do with a particular client.. The system provides a convenient form in which you can record the significant features of such an event.

Under the heading “Organization Notes” in the navigation tree:

Click on “Topic Based Consultation”

This window will display.

You can see that there are many convenient fields in which to enter the pertinent data. Many are drop down lists to speed up the process, while some are text boxes in which to record notes or observations. Attachments can be added to the file, such as minutes or reports.

A Partner in this context is an individual or agency which is a co-presenter of the event, while a Recipient is the audience to whom the event is directed.

Fill in the fields as completely as possible
Add Notes or attachments
Enter the start/finish dates.

The screenshot shows the 'Topic Based Consultation' form in the CARIS system. The left sidebar contains a navigation tree with categories like 'Waiting Lists', 'Beds', 'Internal Referrals', 'Case Transfers', 'Eligibility Lists', 'Reports', 'Facility Notes', and 'Tools and Utilities'. The main form area is titled 'Topic Based Consultation' and contains several sections: 'Mode' (set to Video Conference), 'Duration' (01:00), 'Number of Participants' (16-25), 'Consultation Type' (dropdown), 'Topic' (text field with 'Dealing with Substance Abuse before it happens'), 'Facilitators' (list box with 'Account, Training', 'Account, Training2', 'Account, Training3'), 'Partners' (text field with 'Youth Forensic Services (Aboriginal Agency Youth Services)' and 'Add'/'Delete' buttons), 'Recipient' (text field with 'Victoria High School' and 'Add'/'Delete' buttons), 'Organization Type' (dropdown with 'School'), 'Notes' (text area), 'Add Attachment' (text field with 'Minutes of Consultation.doc (30KB)' and 'Add'/'Delete' buttons), 'Start Date' (8/22/2005), and 'End Date' (8/22/2005). At the bottom are 'Record Consultation' and 'Cancel' buttons.

Note that, when you fill in the partner and recipient fields, you must click “Add” to effect the insertion, leaving them, as in the case of the Recipient above, will initiate a prompt when you try to Record the Consultation. The same is true of the Attachments, you first browse to locate the document, then click “Add” to include it.

Click “Record Consultation.”

The recorded event displays in the “Activities” file.

3.4 CASE NOTES

The Case Notes group of functions provide you with a variety of convenient ways to record activities and events that concern your Clients and their Cases. The “Case Notes” Group only display on your navigation tree when a Client and Case are “In Context”.

An event or activity that is recorded when both a Client and a Case are “In Context” will only be viewable when the same Client and Case are “In Context”.

3.4.1 ATTACHING A FILE

To attach a file to a specific Case:

Bring the Client and Case into Context.
Expand “Case notes” in the navigation tree.

The Attach File window will display.

CARIS

Build 0.57 Login Name: Ann@CYMH Login Time: 9/20/2005 11:52:05 AM

Michael Farrington Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Attach File

Document Name:

Attachment:

Give the document a name
Browse to locate the file you wish to attach
Click on it to bring it into the “Attachment” field.

CARIS

Build 0.57 Login Name: Ann@CYMH Login Time: 9/20/2005 11:52:05 AM

Michael Farrington Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Attach File

Document Name: Notice

Attachment: \\Fs01\Users\Profiles\nike@LLT\My Documents\My Documents\nike's\pers\

Click “Add”

The attachment will be listed and you can then browse to find another file if you wish.

CARIS

Build 0.57 Login Name: Ann@CYMH Login Time: 9/20/2005 11:52:05 AM

Michael Farrington Cymh Outreach (1289) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Attach File

Document Name: Notice

Attachment:

HALEY.doc (32kB)

3.4.2 DETACHING A FILE

If you change your mind, you can detach the attached file.

Highlight it

The screenshot shows the CARIS 'Attach File' window for user Michael Farrington. The document is 'Notice'. An attachment 'HALEY.doc (32KB)' is listed and highlighted. The 'Detach' button is next to the attachment. Below the attachment list are 'Submit' and 'Cancel' buttons. Arrows indicate the sequence of actions: clicking 'Detach' and then 'Submit'.

Click “Detach”

If you are satisfied with the attachment and don’t want to add any others:

Click “Submit”

The screenshot shows the CARIS 'Activities Display' window. It displays a list of activities. One activity is visible: 'File Attachment by Ann (2005-09-20 11:57)'. The 'Activity Filter' is set to 'All Activities'. The page number is 'Page(s): 1'.

The attachment will be recorded in the Case specific “Activities” file.

3.4.3 LOGGING A CLIENT BASED CONSULTATION

A Client based consultation is a conversation or consultation with another person(s) concerning a specific client/case.

A client and case must be in context.

Case Summary

Case Type:	Cymh Outreach	Referral Date:	Aug-04-2005
Case Status:	Pre-Admit	Accept/Reject Date:	Aug-04-2005
Case ID:	1289	Admission Date:	...
Case Manager:	One, Ann_3	Est. Discharge Date:	...
Referral Source:	Self	Discharge Date:	...
Referral Mode:	Walk-in	Case Close Date:	...
Bed Information:	...		
Waitlist Information:	...		

Buttons: Reject Referral, Accept Referral, Cancel Case, Admit, Discharge, Close Case

Open Case Notes
Click on “Client Based Consultation”
Fill in the appropriate fields.

NOTE: Click on the “Facilitator(s) and “Affiliates” to select them. If you want more than one, hold down the “Shift” key to select multiple names. The “Recipient” is the person with whom you are consulting about your client.

Client Based Consultation

Topic: Measles

Mode: Telephone

Start Date: 8/22/2005 End Date: 8/22/2005

Duration: Consultation Type:

Facilitators: One, Ann_3; Huber, Anna-Maria

Affiliates Attending: Reginald, David; Dean, Steve

Recipient: Dr. Jones (Service 1)

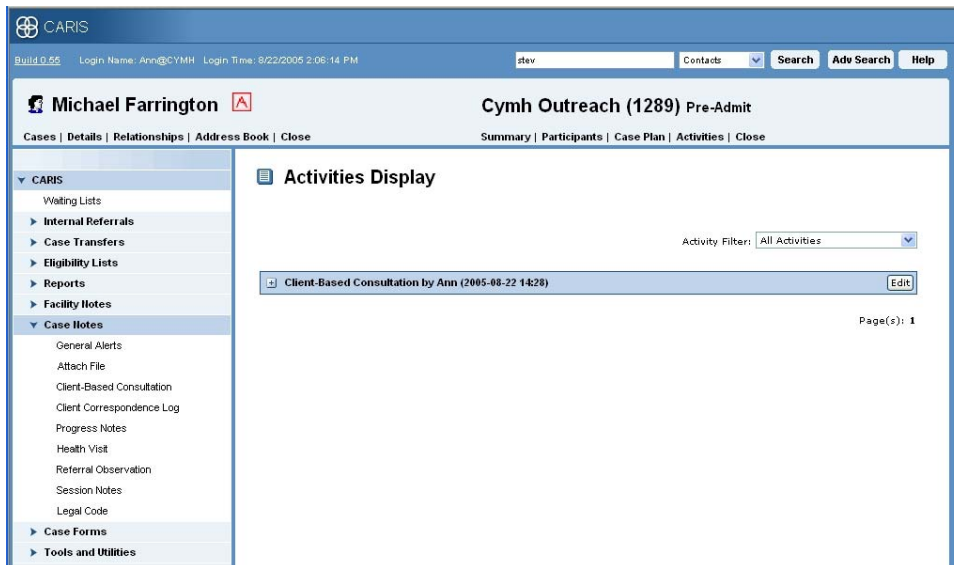
Notes:

Add Attachment: Browse... Add Delete

Buttons: Record Consultation, Cancel

Click “Record Consultation” to save the form.

The consultation will be saved in the “Activities” file.

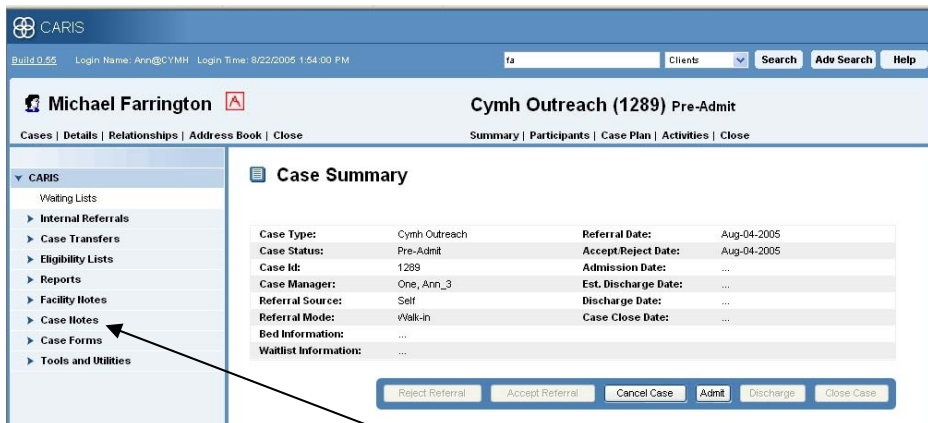


NOTE: The consultation will only be available in the “Activities” list when the client/case are in context. It will not display in the general “Activities” summary.

3.4.4 LOGGING CLIENT CORRESPONDENCE

To record client or case specific communications, you must first:

**Bring the appropriate client into context.
Bring the applicable Case into context.**



- 7) Expand “Case Notes” and
- 8) Click on “Client Correspondence Log”.

Build 0.55 Login Name: Ann@CYMH Login Time: 8/22/2005 1:54:00 PM

Michael Farrington Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Correspondence Log

Time Filter: 8/22/2005

Event Id	Date	Direction	Type	Method	Duration	Notes
----------	------	-----------	------	--------	----------	-------

Page(s): 1

Add Event Cancel

Click "Add Event"

Build 0.55 Login Name: Ann@CYMH Login Time: 8/22/2005 1:54:00 PM

Michael Farrington Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Create Correspondence Log

Date: 8/22/2005

Direction: ☒ Incoming ☐ Outgoing

Type: Informational

Method: Phone

Duration (minutes): 20

Notes: called to say Michael is sick and can't get to his appointment today.

Save Cancel

Fill in the fields and
Click on "Save"

The call will be saved in the correspondence log attached to that particular client/case file.

The screenshot shows the CARIS software interface. At the top, the user is logged in as 'Ann@CYMH' on 8/22/2005. The case is 'Cymh Outreach (1289) Pre-Admit'. The left sidebar shows a navigation menu with 'Case Notes' expanded. The main area displays the 'Correspondence Log' with a table of events. A 'Time Filter' is set to 8/22/2005. The table has columns for Event Id, Date, Direction, Type, Method, Duration, and Notes. One event is listed: Event Id 8073, Date 2005-08-22, Direction Incoming, Type Informational, Method Phone, Duration 20 mins. Below the table are 'Add Event' and 'Cancel' buttons.

Event Id	Date	Direction	Type	Method	Duration	Notes
8073	2005-08-22	Incoming	Informational	Phone	20 mins	

3.4.5 GENERATING PROGRESS NOTES

Progress Notes are a record of the activities and events involving a specific Client/Case. They provide a record of the progress of the case throughout its life, as recorded by the Case Manager and Member(s).

To record a Case Progress Note, with the Client and Case “In Context”:

Expand “Case Notes
Click on “Progress Notes

The screenshot shows the CARIS software interface with the 'Progress Notes' form open. The case is 'Cymh Outreach (1289) Active'. The left sidebar shows 'Case Notes' expanded. The main area has a 'Progress Notes' section with a 'Note Date' field set to 9/14/2005. Below it is a text area for 'Progress Notes' containing the text: 'Michael started putting together his resume today and says he will have it finished tomorrow.' There is an 'Add Attachment' section with a 'Browse...' button and 'Add' and 'Detach' buttons. Below that is a 'Goals & Objectives' section with a 'GOAL: Youth Placement' and an 'OBJECTIVE: Help him retain his own apartment'. At the bottom right are 'Create Note' and 'Cancel' buttons. An arrow points from the text 'Click “Create Note”' to the 'Create Note' button.

The Note date defaults to today's date, but you can select a different date if you need to.

Fill in the various fields as required, and add the note that you wish to record. Click “Create Note”.

(If you wish to check the “Objectives” click on Case Plan and the “Goals and Objective” window will display.)

The screenshot shows the CARIS interface for user Michael Farrington. The main window is titled 'Cymh Outreach (1289) Active'. The left sidebar has a menu with 'Case Notes' expanded, showing options like 'General Alerts', 'Attach File', 'Client-Based Consultation', 'Client Correspondence Log', and 'Progress Notes'. The main area is titled 'Activities Display' and shows a table with one row: 'Progress Notes Observation by Ann (2005-09-14 10:30)'. An 'Edit' button is next to this row. Arrows from the surrounding text point to this 'Edit' button.

The record will display in the “Activities” file.
You can make changes to the record by clicking on “Edit”.

3.4.6 LOGGING HEALTH VISITS

If your client makes a visit to a physician, hospital, clinic or other health related facility, you can record the visit using this form.

To record a Health Visit, with the Client and Case “In Context”:

Expand “Case Notes”
Click on “Health Visit”

The screenshot shows the CARIS interface for user Michael Farrington. The main window is titled 'Cymh Outreach (1289) Active'. The left sidebar has a menu with 'Case Notes' expanded, showing options like 'General Alerts', 'Attach File', 'Client-Based Consultation', 'Client Correspondence Log', 'Progress Notes', 'Health Visit', 'Referral Observation', 'Session Notes', 'Legal Code', 'Case Forms', and 'Tools and Utilities'. The main area is titled 'Health Visit' and displays a form with the following fields: 'Appointment Type' (Medical), 'Topic/Subject' (Bad cough), 'Health Professional's Name' (Dr Jackson), 'Phone Number' (250 - 5551213), 'Mode of Meeting' (Face to Face), 'Note' (This is a persistent cough. Michael is a smoker.), 'Attachment' (Browse... Add Delete), 'Start Time' (9/14/2005 11:30 AM), and 'End Time' (9/14/2005 1:00 PM). Below the form is a section titled 'Goals & Objectives' with a 'GOAL: Youth Placement' and an 'OBJECTIVE: Help him retain his own apartment'.

Select the appropriate items from the Drop Down Lists.
Enter the correct date and times of the visit.

**Add a note explaining the visit.
Attach a document if you wish to.
Click on “Record”**

The screenshot shows the CARIS software interface. The top navigation bar includes the CARIS logo, version (Build 0.57), login information (Ann@CYMH), and search options. The main header displays the user's name (Michael Farrington) and the current case (Cymh Outreach (1289) Active). The left sidebar contains a tree view of the application's functionality, including 'CARIS' (Waiting Lists, Beds, Internal Referrals, Case Transfers, Eligibility Lists, Reports, Facility Notes) and 'Case Notes' (General Alerts, Attach File, Client-Based Consultation, Client Correspondence Log, Progress Notes, Health Visit). The main content area is titled 'Activities Display' and shows a table with one record: 'Health Visit Recorded by Ann (2005-09-14 10:35)'. An 'Edit' button is next to the record. An arrow points from the text above to the 'Edit' button.

**The record will display in the “Activities” file.
You can make changes to the record by clicking the “Edit” button.**

3.4.7 MAKING REFERRAL OBSERVATIONS

When you refer a Client to another facility, you will need to record the reason why the referral was made. This form enables you to do that.

To record a Referral Observation, with the Client and Case “In Context”:

**Expand “Case Notes”
Click on “Referral Observation”**

The screenshot shows the CARIS software interface with the 'Referral Observation' form open. The left sidebar is the same as the previous screenshot. The main content area is titled 'Referral Observation' and contains a form with the following fields: 'Date' (9/14/2005), 'Referral Target' (Maples), 'Referral Reason' (Reason 1), and 'Notes' (Maples staff have been contacted). There is an 'Add Attachment' section with a 'Browse...' button and 'Add' and 'Detach' buttons. Below the form is a 'Goals & Objectives' section with a checkbox for 'GOAL: Youth Placement' and a text area for 'OBJECTIVE: Help him retain his own apartment'. At the bottom right, there are 'Create Note' and 'Cancel' buttons.

**Select the appropriate items from the Drop Down Lists.
Enter the correct date of the referral.
Add a note explaining the reason for the referral.
Attach a document if you wish to.
Click on “Create Note”**

The record will display in the “Activities” file.

3.4.8 RECORDING SESSION NOTES

Session Notes are a record of what occurred during a formal meeting with a Client and/or other Case Members.

To record Session Notes, with the Client and Case “In Context”:

Expand “Case Notes”
Click on “Session Notes”

Select the appropriate items from the Drop Down Lists.
Enter the correct date and duration of the Session.
Enter the names and Roles of the people attending the Session.

NOTE: You must at least put your own name and role in before you can create the note.

Click on “Add” to record the Member(s) in attendance.

Session Notes

Date: 9/14/2005 Start Time: 12:00 AM Duration: 02:00

Appointment Type: Client

Topic/Subject: job

Mode of Meeting: Face to Face

Member: One, Ann_3 (Case Manager)

Affiliate:

Notes: Michael asked for someone to help him with his resume. I will try to find someone with the time.

Attachment:

Goals & Objectives

GOAL: Youth Placement

OBJECTIVE: Help him retain his own apartment

Create Note Cancel

**Add a note with details of the Session.
Attach documents if you wish to.
Click on “Create Note”**

Activities Display

Activity Filter: All Activities

Session Notes Recorded by Ann (2005-09-14 10:43)

Page(s): 1

The record will display in the “Activities” file.

3.4.9 PRESENTING ISSUES

This form allows you to record various issues on an on-going basis.
To record an issue:

Expand “Case Notes”
Click on “Presenting Issues”

YFV CARIS
Waiting Lists
Eligibility Lists
Internal Referrals
Case Transfers
Reports
Organization Notes
Client Forms
Case Notes
Attach File
Client-Based Consultation
Client Correspondence Log
Critical Incident Report
Progress Notes
Health Visit
Referral Observation
Session Notes
Supervision Warning
Personal History
Presenting Issues

Jason Marceau
Program B (35749) Referral
Cases | Details | Relationships | Address Book | Close
Summary | Participants | Case Plan | Activities | Close

Presenting Issues

Presenting Issues: [Dropdown] Add Delete

Reported by: [Dropdown] Date: 9/22/2005

Note: Jason won't eat proper meals, just snacks all the time.

Attachments: [Text Box] Browse... Add Delete

Create Note Cancel

A variety of issues is- provided. You may select one or more of these issues.

Select an Issue
Click “Add”

YFV CARIS
Waiting Lists
Eligibility Lists
Internal Referrals
Case Transfers
Reports
Organization Notes
Client Forms
Case Notes
Attach File
Client-Based Consultation
Client Correspondence Log
Critical Incident Report
Progress Notes
Health Visit
Referral Observation
Session Notes
Supervision Warning
Personal History
Presenting Issues

Jason Marceau
Program B (35749) Referral
Cases | Details | Relationships | Address Book | Close
Summary | Participants | Case Plan | Activities | Close

Presenting Issues

Presenting Issues: [Dropdown] Add Delete

Reported by: Smith, Ann Date: 9/22/2005

Note: Jason won't eat proper meals, just snacks all the time.

Attachments: [Text Box] Browse... Add Delete

Create Note Cancel

Complete the rest of the form
Click on “Create Note”

YFV CARIS

Waiting Lists

- Eligibility Lists
- Internal Referrals
- Case Transfers
- Reports
- Organization Notes
- Client Forms
- Case Notes
 - Attach File
 - Client-Based Consultation
 - Client Correspondence Log
 - Critical Incident Report
 - Progress Notes
 - Health Visit

Activities Display

Activity Filter: All Activities

Type	Creator	Start Date	End Date	Notes
				Presenting issues reported by Ann (2005-09-22 16:49)

Page(s): 1

The issue information is added to the Case Activities file.

3.5 ALERTS

The system provides for tagging client files with Alerts. With a Client and Case in context, the Alerts functions will be available on the Navigation Tree.

3.5.1 CREATING A GENERAL ALERT

Clicking on General Alerts to bring up the General Alerts information window.

YFV CARIS

Waiting Lists

- Eligibility Lists
- Internal Referrals
- Case Transfers
- Reports
- Organization Notes
- Client Forms
- Case Notes
- Alerts
 - General Alerts
 - Supervision Alerts

General Alerts

Type	Creator	Start Date	End Date	Notes
------	---------	------------	----------	-------

Page(s): 1

Add Alert

General Alerts

Add Alerts

To add an alert to a client's file:

Click on the "Add Alert" button
 Select the type of Alert from the drop down list
 Enter any pertinent information in the "Notes" field.
 Click Submit/Save

Alert Type

Submit/Save

The Alert is now attached to the client's file and a red "A" by his name in the Context Field is displayed to let you know that an alert has been generated. Click on the "Note" icon to display the attached note.

Alert Icon

Alert Note

3.5.2 CREATING A SUPERVISION ALERT

A supervision alert is a temporary alert generated to indicate that the client requires some special attention or supervision for a period of time. (Only used in VHRP program at present)

To create a Supervision Alert:

Expand "Alerts" in the navigation tree and:
Click on "Supervision Alert".

CARIS

Login Name: Ann@PSDHH Login Time: 11/7/2005 12:50:51 PM

Robert Charlton (1022835) VHRP (65862) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Supervision Alerts (Charlton, Robert)

Type	Creator	Start Date	End Date	Notes
Special Attention	Villeneuve, Ann	2005-10-19		

Page(s): 1

Add Alert

Click on "Add Alert"

CARIS

Login Name: Ann@PSDHH Login Time: 11/7/2005 12:50:51 PM

Robert Charlton (1022835) VHRP (65862) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Create Supervision Alert

Start Date: 2005-11-07 End Date:

Supervision Alert Type:

Notes:

Add Attachment: Browse... Add Detach

Submit/Save Cancel

Select the Alert Type from the Drop Down List
Add any Notes you wish to describe the nature of the alert
Add any attachments

CARIS

Login Name: Ann@PSDHH Login Time: 11/7/2005 12:50:51 PM

Robert Charlton (1022835) VHRP (65862) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Create Supervision Alert

Start Date: 2005-11-07 End Date: 11/18/2005

Supervision Alert Type: Special Attention

Notes: he's showing signs of depression, please keep an eye on him

Add Attachment: Browse... Add Detach

Submit/Save Cancel

Click “Submit/Save”

The screenshot shows the CARIS VHRP (65862) Active page. The top navigation bar includes the CARIS logo, login information (Ann@PSDHH, 11/7/2005 12:50:51 PM), and search options. The main header displays the client name Robert Charlton (1022835) and the case status VHRP (65862) Active. Below the header, there are tabs for Cases, Details, Relationships, Address Book, and Close. The left sidebar contains a navigation tree with options like Waiting Lists, Beds, Eligibility Lists, Reports, Organization Notes, Case Notes, Alerts, and Case Forms. The main content area is titled 'Supervision Alerts (Charlton, Robert)' and contains a table with two rows of alerts. The first row is for 'Special Attention' by Villeneuve, Ann, starting on 2005-10-19. The second row is for 'Special Attention' by Villeneuve, Ann, starting on 2005-11-07 and ending on 2005-11-18. Each row has an 'Edit' button. At the bottom right, there is an 'Add Alert' button and a page indicator 'Page(s): 1'.

Type	Creator	Start Date	End Date	Notes
Special Attention	Villeneuve, Ann	2005-10-19		Edit
Special Attention	Villeneuve, Ann	2005-11-07	2005-11-18	Edit

The Supervision Alert icon will be displayed until the “End Time” is reached or the alert removed, and the Alert will be listed.

3.6 CASE FORMS

(Only used in VHRP program at present)

The Case Forms function provides standardized forms for recording medication information specific to a Client and Case. Note that this function is only visible in the Navigation Tree when a Case is “In Context”

3.6.1 RECORDING THE ADMISSION INTERVIEW

The Admission Interview contains the demographic and personal information of the Client as recorded by the admitting person or the Case Manager.

To Record the Admission Interview:

With the Client and Case in Context:

Expand the “Case Forms” list on the navigation tree.
Click on “Admission Interview”

The Admission Interview window will display.

Note that once an Admission Interview has been performed for a specific Client and Case, opening this window will display an “Update Admission Interview” window since you can only have one Admission Interview for one Client/Case combination.

Admission Interview

Placement Information

Placement Type: ☒ Short term ☐ Long term

Child Awareness of reasons for placement at VHRP: ☒ Yes ☐ No

Child's reaction to placement at VHRP: good

Location of Family: Outside Lower Mainland

Level of Supervision Required: General Supervision

Explain the Level of Supervision Requirements:

Additional Special Needs: Visual Impairment

Hearing Loss History

Emotional and Behavioral Development

Family and Social Relationships

Health Information

Education & Cognitive Assessment

Child's Interests & Cultural Needs

Record **Cancel**

Complete the Form, providing as much detail as necessary.
Click “Record”

The Interview Form will be recorded and displayed in the “Activities” window.

Activities Display

Activity Filter: All Activities

Admission Interview by Ann (2005-10-13 10:45) **Edit**

Page(s): 1

3.6.2 BUDGET NOTES

The Budget Note feature allows you to keep track of expenditures incurred pertaining to your Cases. It is only available when a Case is “In Context”.

To make a budget entry:

Open “Budget Notes” under “Case Forms”

Budget Note

Date: 9/22/2005

Type: ☐ Funds Received ☒ Expenditure

Authorized by: Smith, Ann

Item: Aspirin

Amount \$: 4.95

Note: Jason had a bad headache and no money.

Receipt: ☒ Yes ☐ No

Goals & Objectives

No Goals and/or Objectives

Create Note Cancel

**Complete the form
Click Create Note**

Budget Note List

Type Filter: All

Date	Type	Item	Amount \$	Note
2005-09-22	Expenditure	Aspirin	4.95	Jason had a bad headache and no money.

View Delete

Page(s): 1

Add Note

The Budget Note has been added to the Budget Note List.

3.6.3 GENERATING THE CARE PLAN CHECKLIST

The Care Plan Checklist is a form that contains a number of questions and responses to help analyse and understand the Client's needs and attributes when setting up a Care Plan.

**To Generate a Care Plan:
With the Client and Case in Context:**

**Expand the "Case Forms" list on the navigation tree.
Click on "Care Plan Checklist"**

The Care Plan Checklist Summary window will display.

CARIS

Login Name: Ann@PSDHH Login Time: 10/13/2005 10:37:27 AM

Jason Clients Search Adv Search Help

Jason Marceau (1001264) Victory Hill Residential Program (56100) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

CARIS

- Waiting Lists
- Beds
- Eligibility Lists
- Reports
- Organization Notes
- Case Notes
- Alerts
- Case Forms
 - Admission Interview
 - Budget Notes
 - Care Plan Checklist
 - Independent Living (ILS) Assessment
 - Medications
 - OTC Checklist

Care Plan Checklist Summary

Date Type Period

Page(s): 1

Add Checklist

You can have more than one checklist for a given Client and Case since the information contained and recorded in the checklist may change over time and require updating without deleting the original information.

To create a new checklist:

Click on “Add Checklist”

The checklist will display.

CARIS

Login Name: Ann@PSDHH Login Time: 10/13/2005 10:37:27 AM

Jason Clients Search Adv Search Help

Jason Marceau (1001264) Victory Hill Residential Program (56100) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

CARIS

- Waiting Lists
- Beds
- Eligibility Lists
- Reports
- Organization Notes
- Case Notes
- Alerts
- Case Forms
 - Admission Interview
 - Budget Notes
 - Care Plan Checklist
 - Independent Living (ILS) Assessment
 - Medications
 - OTC Checklist

Care Plan Checklist

Type: Initial Period: Date: 10/13/2005

	n/a = 0	1	2	3
A. Relationship with Self				
1. Self-Esteem and Confidence	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Positive Self-Identity	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Accountability and Personal Ethics	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Responsibility	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Self-Control	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Stress Management	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Relationship with Family				
C. Relationship with Others				
D. Health and Self Care				
E. Activities of Daily Living				
F. Educational and Vocational				
G. Recreational and Cultural				
H. Spiritual and Moral Development				
I. Community Service				

Save Cancel

Fill in as much of the form as you can or need for your purposes
Click “Save”

The Checklist will be saved and recorded in the Checklist Summary.

Login Name: Ann@PSDHH Login Time: 10/13/2005 10:37:27 AM jason Clients Search Adv Search Help

Jason Marceau (1001264) Victory Hill Residential Program (56100) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Care Plan Checklist Summary

Date	Type	Period
2005-10-13	Initial	Nov

Page(s): 1

[Add Checklist](#)

3.6.4 CREATING THE INDEPENDENT LIVING ASSESSMENT (ILS)

The ILS is a form that provides information to help in assessing a Client's ability to perform the necessary functions and activities to live independently.

To make the Assessment;

With the Client and Case in Context:

Expand the "Case Forms" list on the navigation tree.
Click on "Independent Living (ILS) Assessment"

The ILS Assessment window will display.

Login Name: Ann@PSDHH Login Time: 10/13/2005 10:37:27 AM jason Clients Search Adv Search Help

Jason Marceau (1001264) Victory Hill Residential Program (56100) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Independent Living (ILS) Assessment

Start Date	Type	Period
------------	------	--------

Page(s): 1

[Add](#)

You can have more than one checklist for a given Client and Case since the information contained and recorded in the checklist may change over time and require updating without deleting the original information.

To create a new checklist:

Click on "Add"

The checklist will display.

The screenshot shows the CARIS system interface. At the top, the user is logged in as 'Ann@PSDHH' on 10/13/2005. The client 'Jason' is selected. The main header identifies the client as 'Jason Marceau (1001264)' and the program as 'Victory Hill Residential Program (56100) Pre-Admit'. A sidebar on the left lists various forms, with 'Case Forms' expanded to show 'Independent Living (ILS) Assessment'. The main content area is titled 'Record ILS Assessment'. It includes fields for 'Assessment Type' (set to 'Initial'), 'Assessment Period' (set to 'March'), and 'Date' (set to '10/13/2005'). Below these is a table for 'Organizational/Planning Skills' with columns for 'n/a = 0', '1', '2', and '3'. The table lists 15 skills, each with a radio button for selection. Below the table are sections for 'Responsibilities', 'Financial Management & Investment', 'Chores', 'Accommodation Search', 'Education Preparedness', and 'Job Training Search'. At the bottom right are 'Record' and 'Cancel' buttons.

	n/a = 0	1	2	3
Planning & Goal Setting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Time Management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organizational Skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Responsibility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accountability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Personal Ethics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Flexibility & Adaptability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Positive Attitude Towards Personal Health	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Personal Health & Stress Management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Self-Esteem & Confidence (Interpersonal Skills)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Self Knowledge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to Control & Discipline Self	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Team Work Skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transportation Plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Fill in as much of the form as you can or need for your purposes
Click "Save"

The Checklist will be saved and recorded in the Checklist Summary.

The screenshot shows the 'Independent Living (ILS) Assessment' summary in the CARIS system. The header is the same as the previous screenshot. The sidebar shows 'Independent Living (ILS) Assessment' selected under 'Case Forms'. The main content area is titled 'Independent Living (ILS) Assessment'. It displays a table with the following data:

Start Date	Type	Period	
2005-10-13	Initial Assessment	March	<input type="button" value="View"/> <input type="button" value="Delete"/>

Below the table, it says 'Page(s): 1' and there is an 'Add' button.

3.6.5 LOGGING MEDICATIONS

Medications may be prescription or non-prescription.

To log the prescribed or suggested medications:

Open “Medications” in the navigation tree, under “Case Forms”

The screenshot shows the CARIS software interface. On the left is a navigation tree with categories: CARIS, Internal Referrals, Case Transfers, Eligibility Lists, Reports, Facility Notes, Case Notes, Case Forms, and Tools and Utilities. The 'Case Forms' category is expanded, and 'Medications' is selected. The main area displays the 'Medications' section for 'Cymh Outreach (1289) Pre-Admit'. It includes a table with columns: Medication Name, Medication Class, Prescribing Physician, Dosage, Start Date, and End Date. Above the table are filters for 'Administration Date Filter' (set to Today) and 'View By' (set to Medication). A table with one row is shown. Below the table is a page indicator 'Page(s): 1' and an 'Add Medication' button. An arrow points from the 'Medications' link in the navigation tree to the 'Add Medication' button.

Click “Add Medication”
Fill in the fields as completely as possible.

The screenshot shows the 'Add Medication' form in the CARIS software. The form is titled 'Add Medication' and is for 'Cymh Outreach (1289) Pre-Admit'. It contains several fields: 'Medication Class' (dropdown menu set to 'Nonprescription'), 'Medication Name' (text field with 'Aspirin (acetylsalicylic Acid)' and a search icon [s]), 'Prescribing Physician' (text field), 'Dosage Info' (text field with 'as required'), 'Delivery Route' (text field with 'oral'), 'Frequency Info' (text field), 'Time(s)' (text field with a search icon [C]), 'Start Date' (calendar icon set to 8/23/2005), 'End Date' (calendar icon), and 'Administration Instruction' (text area with 'Do not exceed recommended dosage'). At the bottom right are 'Add Medication' and 'Cancel' buttons. An arrow points from the search icon [s] in the 'Medication Name' field to the text 'Click on the [s]'.

NOTE: To ensure correct medication description, a “Search” option is provided.

Click on the [s]

Build 0.58 Login Name: Ann@CYMH Login Time: 8/23/2005 11:29:54 AM

Michael Farrington Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Add Medication

Medication Class: Nonprescription Medication Name: [s]

Prescribing Physician: [Search Codes]

Dosage Info: Input: aspirin Search

Frequency Info: [Code Selector]

Start Date: 8/23/2005

Administration Instruction: [Select] [Cancel]

Code Selector Results:

- Acetalsalicylic Acid (aspirin)
- Aggrenox (aspirin, dipyridamole)
- Aspirin, dipyridamole (aggrenox)
- Aspirin (acetalsalicylic Acid)

When you type in a generic term, the code selector will provide you with the more specific options.

Select the one that is applicable
Click "Select"

The selected medication will appear in the "Medication Name" field.

When all the required information is entered,

Click "Add Medication"

The medication will display in the medication summary window.

Build 0.58 Login Name: Ann@CYMH Login Time: 8/23/2005 11:29:54 AM

Michael Farrington Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Medications

Administration Date Filter: Today View By: Medication

Medication Name	Medication Class	Prescribing Physician	Dosage	Start Date	End Date
Aspirin (acetalsalicylic Acid)	Non-Prescription	as recommended		2005-08-23	2005-09-30

Page(s): 1

Add Medication

The summary can be expanded by clicking on the "+".

3.6.6 RECORDING ADMINISTRATION OF MEDICATION.

In the expanded medication summary, there is a button labeled “Administer”.

Build 0.58 Login Name: Ann@CYMH Login Time: 8/23/2005 11:28:54 AM

Michael Farrington Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Medications

Administration Date Filter: Today View By: Medication

Medication Name	Medication Class	Prescribing Physician	Dosage	Start Date	End Date
Aspirin (acetylsalicylic Acid)	Non-Prescription		as recommended	2005-08-23	2005-09-30

Frequency: as required
Delivery Route: oral
Times:
Note:

Discontinue Administer

Page(s): 1

Add Medication

To record the administration of this medication:

Click “Administer”

Build 0.58 Login Name: Ann@CYMH Login Time: 8/23/2005 11:28:54 AM

Michael Farrington Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Record Medication Administration

Medication Name: Aspirin (acetylsalicylic Acid)
Dosage Info: as recommended Delivery Route: oral
Frequency Info: as required

Date: Today Time: 11:45 AM
Code:
Notes:

Administered
Away
Missed
Refused

Save Cancel

9) Fill in the fields
10) Click “Save”

The administration record will be saved to the “Activities” record attached to this client/case file.

Build 0.58 Login Name: Ann@CYMH Login Time: 8/23/2005 11:28:54 AM

Michael Farrington Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Activities Display

Activity Filter: All Activities

Medication Intervention	
Time Detail	
Activity Date	2005-08-23T11:47:00
Critical Date	2005-08-23T11:47:00
Participant Detail	
Recording Person	One, Ann_3
Organization	Child and Youth Mental Health_2
Target Client	Farrington, Michael

Page(s): 1

3.6.7 DELETING A MEDICATION ADMINISTRATION RECORD

Should you make an error when recording the administration of a medication, you can correct the error by deleting that particular record and re-administering the medication.

Open the Medication Record
Locate the specific medication administration record you wish to delete.
Click “Delete”

Build 0.58 Login Name: Ann@CYMH Login Time: 8/25/2005 11:13:41 AM

Michael Farrington Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Medications

Administration Date Filter: Today View By: Medication

Medication Name	Medication Class	Prescribing Physician	Dosage	Start Date	End Date
Aspirin (acetylsalicylic Acid)	Non-Prescription	as recommended	as recommended	2005-08-23	2005-09-30

Frequency: as recommended

Delivery Route:	Admin Date	Time	Admin Code	Admin By	Note
oral	2005-08-25	11:15:00	Administered	One, Ann_3	Delete
Times: 9:00 AM, 5:00 PM, 9:00 PM	2005-08-25	12:00:00	Administered	One, Ann_3	Delete

Note:

Discontinue Administer

Page(s): 1

Add Medication

The delete administration form will display.

Fill in the fields
Click “Save”

CARIS
Build 0.58 Login Name: Ann@CYMH Login Time: 8/25/2005 11:13:41 AM

Michael Farrington Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Delete Medication Administration

Medication Name:	Aspirin (acetasalacylic Acid)	Code:	Administered
Date:	2005-08-25	Time:	12:00:00 PM
Reason Code:	Time Mistyped		
Notes:	wrong time inserted		

Save Cancel

The deleted item will show up in the medication summary, but will be crossed out. The reason can be checked later by passing the cursor over the item, and a summary will display.

CARIS
Build 0.58 Login Name: Ann@CYMH Login Time: 8/25/2005 11:13:41 AM

Michael Farrington Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Medications

Administration Date Filter: Today View By: Medication

Medication Name	Medication Class	Prescribing Physician	Dosage	Start Date	End Date
Aspirin (acetasalacylic Acid)	Non-Prescription	as recommended		2005-08-23	2005-09-30

Frequency: as recommended
Delivery Route: oral
Times: 9:00 AM, 5:00 PM, 9:00 PM

Admin Date	Time	Admin Code	Admin By	Note
2005-08-25	11:15:00	Administered	One, Ann_3	
2005-08-25	12:00:00	Administered	One, Ann_3	

Note:
Discontinue Administer

Delete Date: 2005-08-25
Delete Time: 11:47:00
Reason Code: TM
Notes: wrong time inserted
Deleting Party: One, Ann_3

Page(s): 1

Add Medication

3.6.8 DISCONTINUING A MEDICATION

To discontinue a medication:

Open and expand the applicable medication.
Click "Discontinue"

Build 0.58 Login Name: Ann@CYMH Login Time: 8/25/2005 11:13:41 AM

Michael Farrington Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Medications

Administration Date Filter: Today View By: Medication

Medication Name	Medication Class	Prescribing Physician	Dosage	Start Date	End Date
Aspirin (acetylsalicylic Acid)	Non-Prescription		as recommended	2005-08-23	2005-09-30
Frequency: as recommended		Admin Date Time	Admin Code	Admin By	Note
Delivery Route: oral		2005-08-25 11:15:00	Administered	One, Ann_3	Delete
Times: 9:00 AM, 5:00 PM, 9:00 PM		2005-08-25 12:00:00	Administered	One, Ann_3	Delete
Note:					

Discontinue Administer

Page(s): 1

Add Medication

A prompt will display asking if you really want to discontinue the medication.

Click Yes

The medication will no longer be displayed on the “Medications” window.

3.6.9 CHANGING A MEDICATION

If you wish to change a medication, or any aspect of its application such as frequency, dates, times or dosage, you must delete the existing medication and add a new one. This is for legal and medical practice reasons.

To change a Medication:

Open the Medication file.
Select the medication you wish to change
Expand it

Build 0.58 Login Name: Ann@CYMH Login Time: 8/25/2005 11:13:41 AM

Michael Farrington Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Medications

Administration Date Filter: Today View By: Medication

Medication Name	Medication Class	Prescribing Physician	Dosage	Start Date	End Date
Aspirin (acetylsalicylic Acid)	Non-Prescription		as recommended	2005-08-23	2005-09-30
Frequency: as recommended		Admin Date Time	Admin Code	Admin By	Note
Delivery Route: oral		2005-08-25 11:15:00	Administered	One, Ann_3	Delete
Times: 9:00 AM, 5:00 PM, 9:00 PM		2005-08-25 12:00:00	Administered	One, Ann_3	Delete
Note:					

Discontinue Administer

Page(s): 1

Add Medication

Click Delete

11) Proceed as in Section 3.7.

3.6.10 THE OTC CHECKLIST

A checklist is provided to record the use of any Over The Counter medications that the client customarily uses or intends to use. This provides a quick reference based on experience or other evidence concerning the client's compatibility with or success with OTC medications.

Expand Case Forms
Click on Medication Management
Click on OTC Checklist

YFV CARIS

Login Name: Ann@YFV Login Time: 9/22/2005 3:45:08 PM

Clients Search Adv Search Help

Jason Marceau

Program B (35749) Referral

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

YFV CARIS

- Waiting Lists
- Eligibility Lists
- Internal Referrals
- Case Transfers
- Reports
- Organization Notes
- Client Forms
- Case Notes
- Alerts
- Case Forms
 - Lab Tests
 - Medication Management
 - Medications
 - OTC Checklist

OTC Checklist Summary

Date	Signed-Off by Physician	Placed in Client's Central File
------	-------------------------	---------------------------------

Page(s): 1

Add

Since no Checklist is shown:

Click "Add"

CARIS

Login Name: Ann@YFV Login Time: 9/22/2005 3:45:08 PM

Jason Marceau

Program B (35749) Referral

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

YFV CARIS

- Waiting Lists
- Eligibility Lists
- Internal Referrals
- Case Transfers
- Reports
- Organization Notes
- Client Forms
- Case Notes
- Alerts
- Case Forms
 - Lab Tests
 - Medication Management
 - Medications
 - OTC Checklist
 - Diagnostic Assessments
 - Budget Notes
 - Other Forms
 - Assessments
 - External Services
 - Tools and Utilities

OTC Checklist

Date: 9/22/2005

A. Pain Reliever

Name	Comment
1. Advil	<input checked="" type="radio"/> Yes <input type="radio"/> No
2. Tylenol - Chewable	<input checked="" type="radio"/> Yes <input type="radio"/> No tends to spit them out
3. Tylenol - Liquid	<input checked="" type="radio"/> Yes <input type="radio"/> No
4. Tylenol Regular	<input checked="" type="radio"/> Yes <input type="radio"/> No

B. Cough and Colds

C. Indigestion, Constipation, Diarrhea

D. First Aid and Others

E. Other OTC Medication

Signed off by physician? ☐ Yes ☒ No

Is the original document placement on client's central file? ☐ Yes ☒ No

Save Cancel

The Checklist must be **COMPLETELY** filled in before it can be saved. In other words, all the listed items must be checked as Yes or No. A prompt will appear if you have missed any before you can Save it.

Complete the Checklist
Click "Save"

CARIS

Login Name: Ann@YFV Login Time: 9/22/2005 3:45:08 PM

Jason Marceau

Program B (35749) Referral

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

YFV CARIS

- Waiting Lists
- Eligibility Lists
- Internal Referrals
- Case Transfers
- Reports
- Organization Notes
- Client Forms
- Case Notes
- Alerts
- Case Forms
 - Lab Tests
 - Medication Management
 - Medications
 - OTC Checklist

OTC Checklist Summary

Date	Signed-Off by Physician	Placed in Client's Central File
2005-09-22	No	No

Edit Delete

Page(s): 1

Add

The checklist will be displayed on the OTC Checklist Summary window.

4 Agency Specific Functions

Most of the functions described in this Manual are common to all the agencies using the CARIS system. Some agencies have specific requirements or business practices that only apply to them. This section contains some activities which are agency specific.

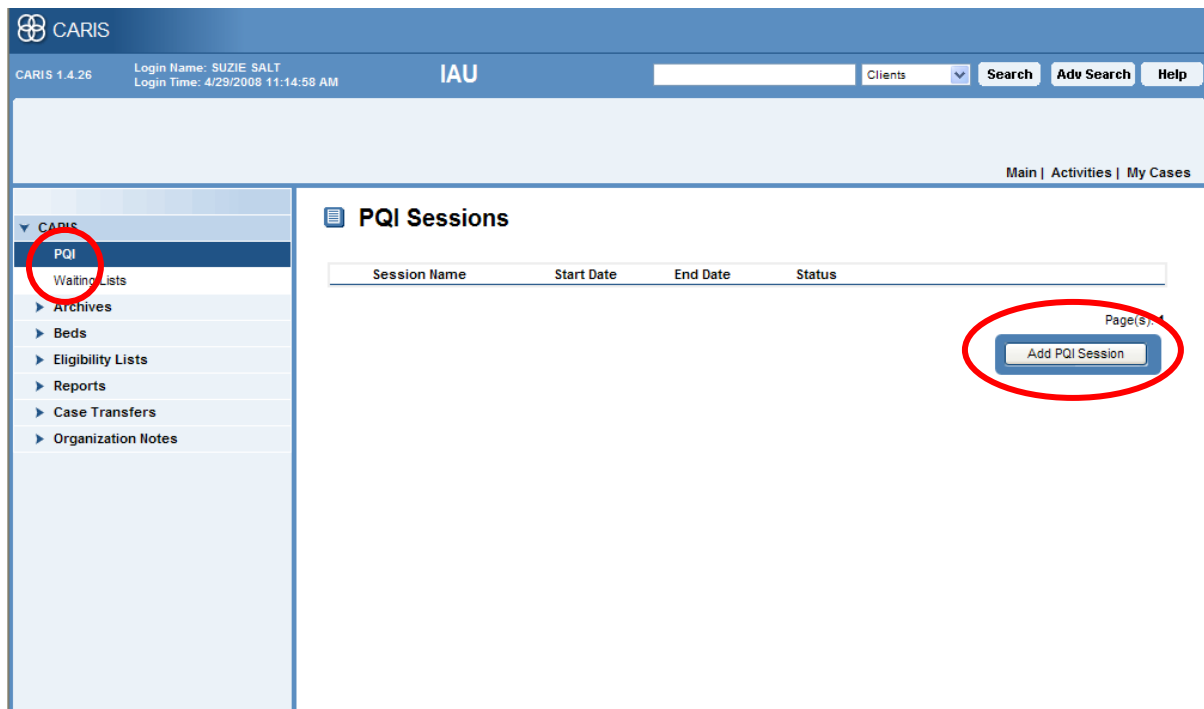
4.1 PERFORMANCE QUALITY IMPROVEMENT (PQI) AUDIT

The Performance Quality Improvement Audit the reviewers uses for reviewing client files, outcome measure reviews, critical incidents, satisfaction surveys and client or staff complaints/feedback.

4.1.1 CREATING A PQI SESSION

Click “PQI” on left menu on CARIS context

Click “Add PQI Session” to set up quarterly reviews



Click “Case Selection”

Enter the Start and End date

Click “Case ID” to set up programs – Press Shift button or CTRL button on the keyboard and scroll the mouse to the desired programs to be reviewed

Press “20%” for both open and closed files

Click “Add”

The screenshot shows the 'PQI Session' form with a 'Case Selection' dialog box open. The dialog box has fields for 'Start Date' (2007-04-01), 'End Date' (2007-06-30), 'Case Type for Open Cases' (Residential - Treatment, VOTP, YSAM, YSOTP), '% of Open Cases' (0%), 'Number of Open Cases' (0%), 'Case Type for Close Cases' (20%, 30%, 35%, 40%, 45%, 47%, 48%, 100%, Other), and '% of Close Cases'. The 'Add' button is circled in red, and a red arrow points to it from the 'Case Selection ...' button in the main form.

A list of files will be shown like this:

The screenshot shows the 'PQI Session' form with a list of files circled in red. The list has columns for 'Case #', 'Case Phase', 'Case Type', 'CARIS ID', and 'Client Name'. The data is as follows:

Case #	Case Phase	Case Type	CARIS ID	Client Name
388575	Active	Court Ordered Assessment	1013964	Bunny, Easter
389696	Active	Court Ordered Assessment	1013987	Cloud, Grey

The 'PQI Session Information' section at the bottom has fields for 'PQI Session Name', 'PQI Period', and 'Comments'. The 'Save' and 'Cancel' buttons are at the bottom right.

Next, go to PQI Review Member Selection and click “Add” for adding reviewers
 Then to PQI Session Information and type in PQI Session Name box i.e. *1st quarter*
 Next, PQI Period and type i.e. *September 2009*
 Type comments as needed (up to 6000 characters)
 Click “Save”

PQI Session

PQI File Selection

Case Selection ...

Case ID: Add Delete

Case #	Case Phase	Case Type	CARIS ID	Client Name
388575	Active	Court Ordered Assessment	1013964	Bunny, Easter
389696	Active	Court Ordered Assessment	1013987	Cloud, Grey

PQI Review Member Selection

Add... Delete

PQI Reviewer: DALE SIMON

PQI Session Information

PQI Session Name: Jan - March 2009

PQI Period: 1st Quarter 2009

Comments: This PQI session will be conducted using CARIS.
 Number of characters input = 53

Save Cancel

PQI Facilitator will click “View Audit Information” to confirm a list of reviewers

[Export PDF](#)

Case ID	View Date	Member ID
384291	2009-03-01	IDRICARTRN01
384291	2009-03-11	IDRICARTRN01

Cancel

PQI reviewers can begin auditing cases

4.1.2 REVIEWING FILES (BEGIN THE SESSION)

Click “PQI” on the left menu. PQI Session page will be shown:
Click “View” to open the session

Main | Activities | My Cases

▼ CARIS

- PQI**
- Waiting Lists
- Archives
- Beds
- Eligibility Lists
- Reports
- Case Transfers
- Organization Notes

PQI Sessions

Session Name	Start Date	End Date	Status
Jan - May 2009	2009-05-07		Active

Page(s): 1

Add PQI Session

Click “View Case” to print a case review report

CARIS 1.4.60 Login Name: TRAMING, 01 CARIS Login Time: 3/11/2009 1:37:04 PM PSDHH

Main | Activities | My Cases

PQI Sessions

Session Name	Start Date	End Date	Status
Test	2009-03-01		Active

Close

Quantitative Aggregate Report Session Review Audit Report Delete Print

CASE ID	Case Type	Client ID	Client Name	Review Status
384291	Administration	1013838	Who, Seany Frank	Pending

Open View Case Case Review

Page(s): 1

Add PQI Session

Click “PQI Case Review Report” on REPORTS menu. Click “Export PDF” hyperlink and print.

The document will provide dates for each activity and guide the reviewers to find the necessary information quicker

The screenshot shows the CARIS 1.4.60 interface. The user is logged in as TRAINING_01 CARIS. The main menu on the left includes CARIS, PQI, Waiting Lists, Archives, Beds, Eligibility Lists, Reports, Organization Notes, Case Notes, Alerts, and Case Forms. The 'Reports' menu is expanded, and 'PQI Case Review Report' is highlighted. The main content area displays the 'PQI Case Review Report' for 'Administration (384291) [Read-Only] Referral'. The report includes a header with the British Columbia logo and the text 'The Best Place to Live'. Below the header, there is a table with the following data:

Activity name	# of Occurrences	Last Date
Admission Interview	0	
Assessment	0	
Audits	0	
Bed Reservation	0	
Budget Note	0	
Care Plan Checklist	0	
Client-Based Consultation	0	
Correspondence Log	0	
Discharge Activity	0	
Eligibility List Enrollment	0	

The 'Export PDF' link is circled in red. The status bar at the bottom indicates 'Internet | Protected Mode: On' and '100%' zoom.

After reviewing and making notes for each activity, reviewers need to:

Click “Case Review” to open the evaluation list

The screenshot shows the CARIS 1.4.60 interface. The user is logged in as TRAINING_01 CARIS. The main menu on the left includes CARIS, PQI, Waiting Lists, Archives, Beds, Eligibility Lists, Reports, Organization Notes, Case Notes, Alerts, and Case Forms. The 'Reports' menu is expanded, and 'PQI Case Review Report' is highlighted. The main content area displays the 'PQI Sessions' for 'Administration (384291) [Read-Only] Referral'. The sessions table shows the following data:

Session Name	Start Date	End Date	Status
Test	2009-03-01		Active

The 'Case Review' link is circled in red. The status bar at the bottom indicates 'Internet | Protected Mode: On' and '100%' zoom.

Case Review

Questions	Electronic File	Paper File	Comments
Phase Transition:	<input type="text" value="Meets Standards"/>	<input type="text" value="Not Applicable"/>	<input type="text" value="Type comments here"/>
Intake/Presenting Issues:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Case Plans:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Regular Recording of Case Notes:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Required Documents Attached to Case:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Regular Contact:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Supervisor Review:	<input type="text"/>	<input type="text"/>	<input type="text"/>
OTC Completed:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Incident Report:	<input type="text"/>	<input type="text"/>	<input type="text"/>
ROI/Consents:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Discharge/Aftercare:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Service Needs Addressed:	<div><div>Does Not Meets Standards</div><div>Meets Standards</div><div>Needs Review</div><div>Not Applicable</div></div>	<input type="text"/>	<input type="text"/>

For each box, you will need to choose one of the following:

Not Applicable

ROI/Consents:	Does Not Meets Stand	Not Applicable	
Discharge/Aftercare:	Meets Standards	Meets Standards	
Service Needs Addressed:	Meets Standards	Meets Standards	

Attachments:

(Max file size: 1MB)

Click “Finalize” when you are satisfied with your comments

105

Main | Activities | My Cases

PQI Sessions

Session Name: Test Start Date: 2009-03-01 End Date: Status: Active

Quantitative Aggregate Report Session Review Audit Report Delete Print

CASE ID	Case Type	Client ID	Client Name	Review Status
384291	Administration	1013838	Who, Seany Frank	Reviewed

Case Review Details:

Question	Answer for Electronic Paper File	Answer for Paper File	Notes
Phase Transition:	Meets Standards	Meets Standards	
Intake/Presenting Issues:	Does Not Meet Standards	Does Not Meet Standards	
Case Plans:	Needs Review	Needs Review	
Regular Recording of Case Notes:	Not Applicable	Not Applicable	
Required Documents Attached to Case:	Meets Standards	Meets Standards	
Regular Contact:	Needs Review	Not Applicable	
Supervisor Review:	Does Not Meet Standards	Meets Standards	
OTC Completed:	Needs Review	Not Applicable	
Incident Report:	Does Not Meet Standards	Needs Review	
ROI/Consents:	Meets Standards	Not Applicable	
Discharge/Aftercare:	Meets Standards	Meets Standards	
Service Needs Addressed:	Meets Standards	Meets Standards	

Page(s): 1

Add PQI Session

Done

Internet | Protected Mode: On 100%

PQI Facilitator can keep track of which files have been completed by clicking “Audit Report.”

CARIS 1.4.68 Login Name: W0400001_01 CARIS Login Time: 3/15/2009 1:57:58 PM PSDHH

Main | Activities | My Cases

PQI Sessions

Session Name: Test Start Date: 2009-03-01 End Date: Status: Active

Quantitative Aggregate Report Session Review Audit Report Delete Print

CASE ID	Case Type	Client ID	Client Name	Review Status
384291	Administration	1013838	Who, Seany Frank	Pending

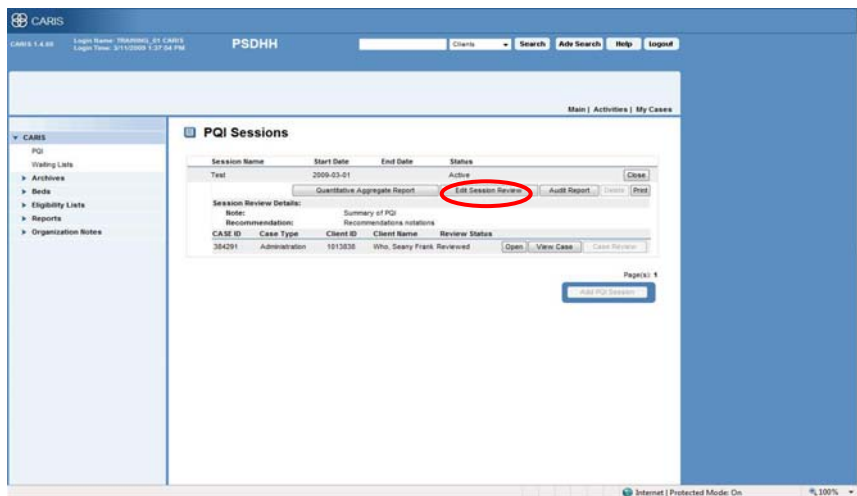
Page(s): 1

Add PQI Session

Internet | Protected Mode: On 100%

4.1.3 CLOSING THE PQI SESSION

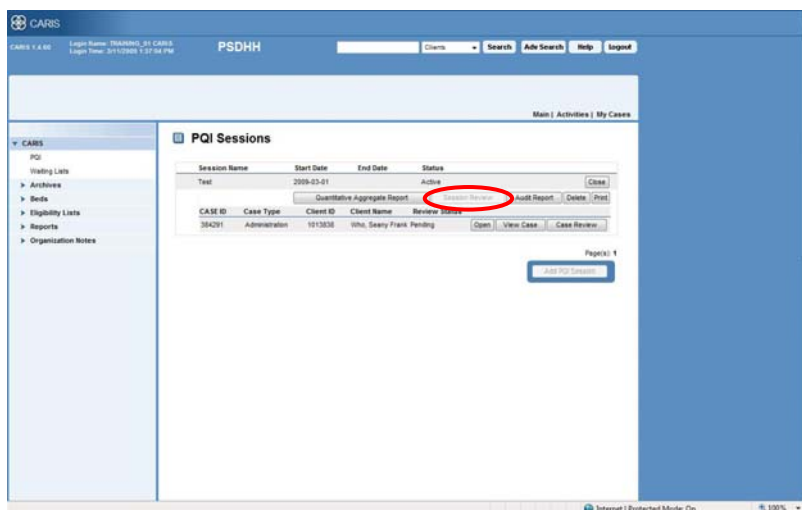
Click “Session Review”



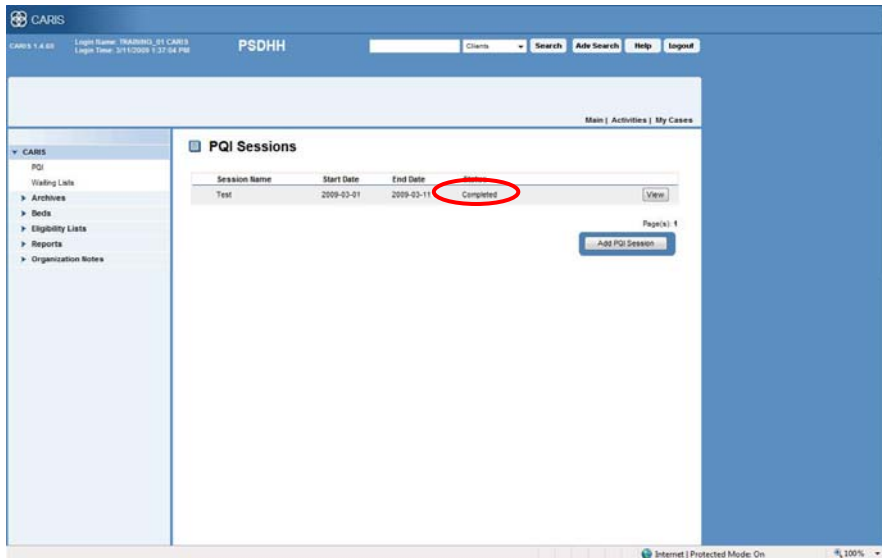
PQI Facilitator puts a final word on boxes based on reviewers' input
The window can be edited or saved until the “Finalize” is clicked

The screenshot shows the 'PQI Session Review' form. It has two main text input areas: 'Summary of PQI' and 'Recommendations: Recommendations notations'. Both are circled in red. Below these is an 'Attachments' section with a 'Browse...' button, an 'Add' button, and a 'Detach' button. At the bottom right, there are three buttons: 'Save', 'Finalize' (circled in red), and 'Cancel'.

Click the “Session Review”



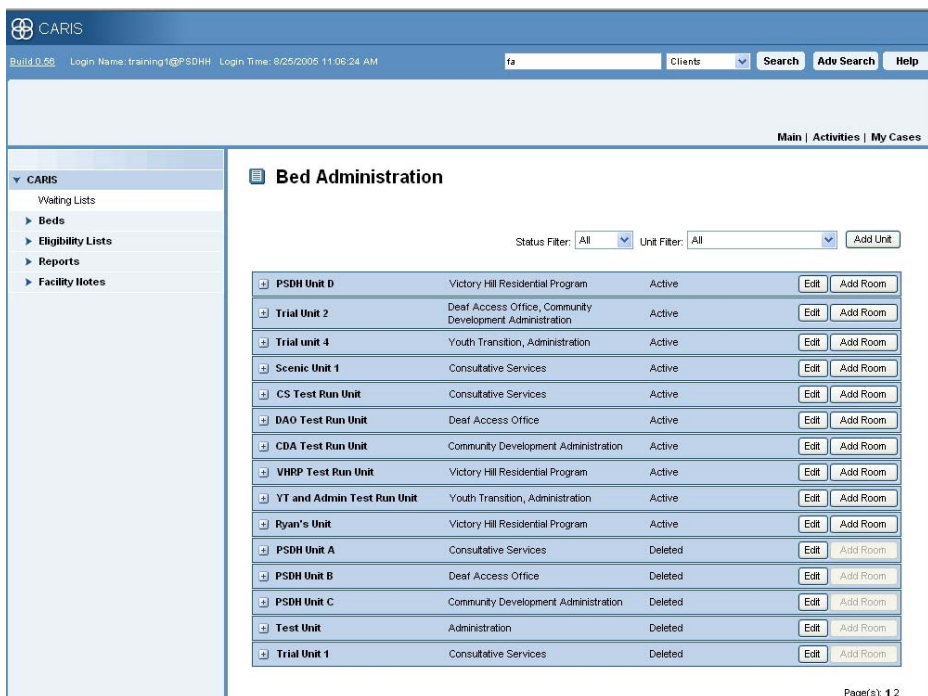
The session is complete



4.2 BED ADMINISTRATION

The Bed Administration functions enable an organization to manage a complex residential facility with a diversity of units or wards, rooms and bed types. The Bed Administration function allows you to add and remove beds, rooms and units and change the designation of beds according to gender

12) Open “Administration” under “Beds” on the navigation tree.



You will see that the solid blue lines indicate specific “Units”. When you expand a “Unit” the list of rooms will be shown, and when you expand each room, the bed information for that room displays.

4.2.1 ADDING A UNIT

Note that only authorized persons may add, remove or otherwise edit rooms, beds and units. If you are not authorized to perform these actions, the box will be *grayed out* and you will be unable to use it.

Build 0.58 Login Name: training1@PSDHH Login Time: 8/25/2005 11:06:24 AM

fa Clients Search Adv Search Help

Main | Activities | My Cases

Bed Administration

Status Filter: All Unit Filter: All Add Unit

PSDH Unit D	Victory Hill Residential Program	Active	Edit	Add Room
Trial Unit 2	Deaf Access Office, Community Development Administration	Active	Edit	Add Room
Trial unit 4	Youth Transition, Administration	Active	Edit	Add Room
Scenic Unit 1	Consultative Services	Active	Edit	Add Room
CS Test Run Unit	Consultative Services	Active	Edit	Add Room
DAO Test Run Unit	Deaf Access Office	Active	Edit	Add Room
CDA Test Run Unit	Community Development Administration	Active	Edit	Add Room
VHRP Test Run Unit	Victory Hill Residential Program	Active	Edit	Add Room
YT and Admin Test Run Unit	Youth Transition, Administration	Active	Edit	Add Room
Ryan's Unit	Victory Hill Residential Program	Active	Edit	Add Room
PSDH Unit A	Consultative Services	Deleted	Edit	Add Room
PSDH Unit B	Deaf Access Office	Deleted	Edit	Add Room
PSDH Unit C	Community Development Administration	Deleted	Edit	Add Room
Test Unit	Administration	Deleted	Edit	Add Room
Trial Unit 1	Consultative Services	Deleted	Edit	Add Room

Page(s): 1 2

Click on "Add Unit"

The Create Unit window will display.

Build 0.58 Login Name: training1@PSDHH Login Time: 8/25/2005 11:06:24 AM

fa Clients Search Adv Search Help

Main | Activities | My Cases

Create Unit

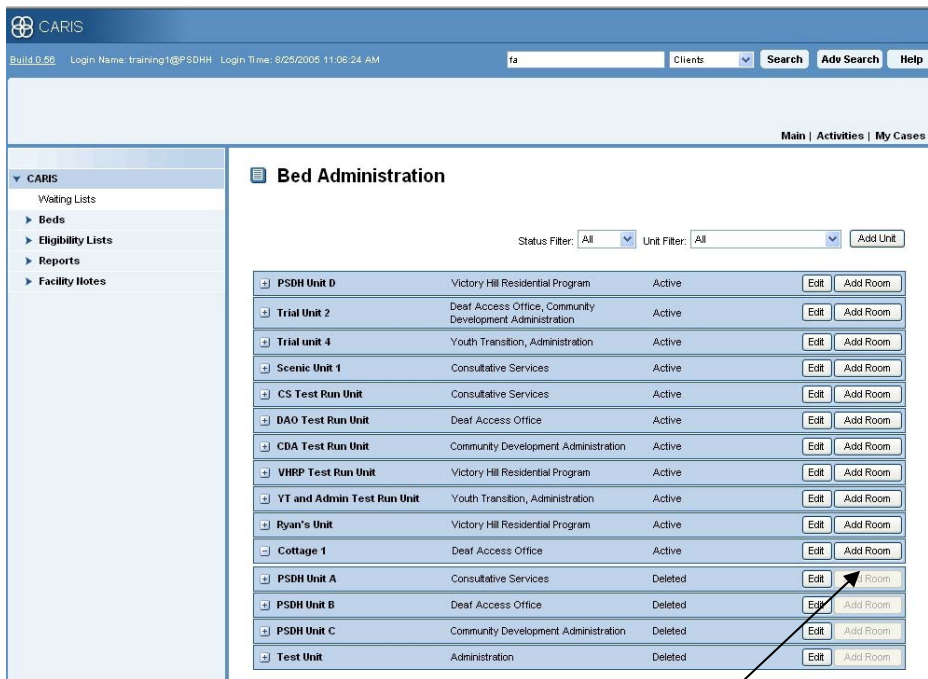
Name: Cottage 1

Program: CS
DAO
SFCD

Admin Status: Active

Save Cancel

Enter the name of the Unit
Click on the appropriate program.
Click "Save"



The Unit is now added to the list.

4.2.2 ADDING A ROOM TO A UNIT

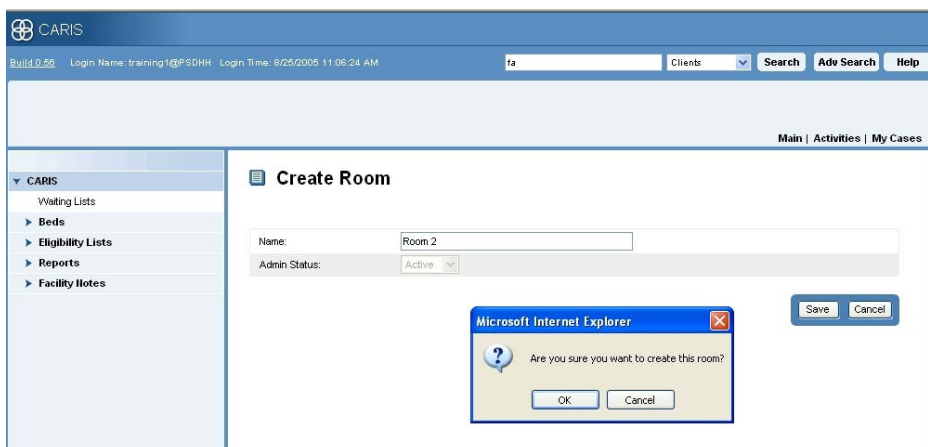
A Unit will contain one or more rooms. To add a room to a Unit:

Click on “Add Room”.

The “Create Room” window will display.

Give the room a name
Click on “Save”.

NOTE: On almost every operation you perform, you will receive a prompt that asks if you really want to perform the operation. “OK” will activate the operation, “Cancel” will take you back to the previous window.



The newly created room will be added to the Unit on the summary page.

Bed Administration

Status Filter: All Unit Filter: All Add Unit

PSDH Unit D	Victory Hill Residential Program	Active	Edit	Add Room
Trial Unit 2	Deaf Access Office, Community Development Administration	Active	Edit	Add Room
Trial unit 4	Youth Transition, Administration	Active	Edit	Add Room
Scenic Unit 1	Consultative Services	Active	Edit	Add Room
CS Test Run Unit	Consultative Services	Active	Edit	Add Room
DAO Test Run Unit	Deaf Access Office	Active	Edit	Add Room
CDA Test Run Unit	Community Development Administration	Active	Edit	Add Room
VHRP Test Run Unit	Victory Hill Residential Program	Active	Edit	Add Room
YT and Admin Test Run Unit	Youth Transition, Administration	Active	Edit	Add Room
Ryan's Unit	Victory Hill Residential Program	Active	Edit	Add Room
Cottage 1	Deaf Access Office	Active	Edit	Add Room
Room 1	Active	Edit	Add Bed	
Room 2	Active	Edit	Add Bed	
PSDH Unit A	Consultative Services	Deleted	Edit	Add Room
PSDH Unit B	Deaf Access Office	Deleted	Edit	Add Room
PSDH Unit C	Community Development Administration	Deleted	Edit	Add Room
Test Unit	Administration	Deleted	Edit	Add Room

Page(s): 1 2

4.2.3 ADDING A BED TO A ROOM

To add a bed or beds to a room:

Click on “Add Bed” opposite the room you wish to place it in.

The Create Bed window will display.

Create Bed

Name: Bed A

Type: Regular

Gender: Female

Admin Status: Active

Save Cancel

Name the Bed

Select the type from the drop down list

Select the gender of the occupant that the bed is designated for.

Click “Save”

The bed will now be added to the room.

CARIS
Build 0.56 Login Name: training1@PSDHH Login Time: 8/25/2005 11:06:24 AM

ta Clients Search Adv Search Help

Main | Activities | My Cases

Bed Administration

Status Filter: All Unit Filter: All Add Unit

PSDH Unit D	Victory Hill Residential Program	Active	Edit	Add Room
Trial Unit 2	Deaf Access Office, Community Development Administration	Active	Edit	Add Room
Trial Unit 4	Youth Transition, Administration	Active	Edit	Add Room
Scenic Unit 1	Consultative Services	Active	Edit	Add Room
CS Test Run Unit	Consultative Services	Active	Edit	Add Room
DAO Test Run Unit	Deaf Access Office	Active	Edit	Add Room
CDA Test Run Unit	Community Development Administration	Active	Edit	Add Room
VHRP Test Run Unit	Victory Hill Residential Program	Active	Edit	Add Room
VT and Admin Test Run Unit	Youth Transition, Administration	Active	Edit	Add Room
Ryan's Unit	Victory Hill Residential Program	Active	Edit	Add Room
Cottage 1	Deaf Access Office	Active	Edit	Add Room
Room 1	Active	Edit	Add Bed	
Bed A	Regular	Female	Active	Edit
Room 2	Active	Edit	Add Bed	
PSDH Unit A	Consultative Services	Deleted	Edit	Add Room
PSDH Unit B	Deaf Access Office	Deleted	Edit	Add Room
PSDH Unit C	Community Development Administration	Deleted	Edit	Add Room
Test Unit	Administration	Deleted	Edit	Add Room

4.2.4 BED MANAGEMENT

The Bed Management function opens a window that contains a list of all the units, rooms and beds available to the agency. If you are authorized to do so, you can edit any of the elements by clicking on "Edit".

Michael Farrington Community Development Administration (8986) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Bed Management

Unit Filter: All

Bed Name	Status	Type	Gender	Note
CDA Test Run Unit / Special Needs Room / B4	Active	Special Needs	Male	Edit
Cottage 1 / Room 1 / Bed A	Active	Regular	Female	Edit
Cottage 1 / Room 2 / Bed 1	Active	Regular	Male	Edit
CS Test Run Unit / Boy room / B1	Active	Regular	Male	Edit
CS Test Run Unit / Boy room / B2	Active	Regular	Male	Edit
CS Test Run Unit / Boy room / B3	Active	Regular	Male	Edit
CS Test Run Unit / Boy room / B4	Active	Regular	Male	Edit
CS Test Run Unit / Extra room / B1	Active	Regular	Any	Edit
CS Test Run Unit / Extra room / B2	Active	Regular	Any	Edit
CS Test Run Unit / Extra room / B3	Active	Special Needs	Any	Edit
CS Test Run Unit / Extra room / B4	Active	Special Needs	Any	Edit
CS Test Run Unit / Girl Room / B1	Active	Regular	Female	Edit
CS Test Run Unit / Girl Room / B2	Active	Regular	Female	Edit
CS Test Run Unit / Girl Room / B3	Active	Regular	Female	Edit
CS Test Run Unit / Girl Room / B4	Active	Regular	Female	Edit

Page(s): 1 2 3 4 5 6 7 8

Note that there is possibly more than a single page of listings. The listings can be organized by clicking on the headings. In the above case they are organized by Bed Name, so the beds show up in alphabetical order. You could organize the list by Status, type or gender by clicking on the

heading. There is a filter available which will narrow the list if you know which unit you wish to view. For example, if you just want to view the “Cottage” listings,

Open the “Unit Filter” Drop Down list
Select “Cottage 1”

Michael Farrington Community Development Administration (8986) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Bed Management

Unit Filter: All

Bed Name	Status	Type	Gender	
CDA Test Run Unit / Boy Room / B1	Blocked	Regular	Male	
CDA Test Run Unit / Boy Room / B2	Active	Regular	Male	
CDA Test Run Unit / Boy Room / B3	Active	Regular	Male	
CDA Test Run Unit / Boy Room / B4	Active	Regular	Male	
CDA Test Run Unit / Extra Room / B1	Active	Regular	Any	
CDA Test Run Unit / Extra Room / B2	Active	Regular	Any	
CDA Test Run Unit / Extra Room / B3	Active	Special Needs	Any	
CDA Test Run Unit / Extra Room / B4	Active	Special Needs	Any	
CDA Test Run Unit / Girl Room / B1	Active	Regular	Female	
CDA Test Run Unit / Girl Room / B2	Active	Regular	Female	
CDA Test Run Unit / Girl Room / B3	Active	Regular	Female	
CDA Test Run Unit / Girl Room / B4	Active	Regular	Female	
CDA Test Run Unit / Special Needs	Active	Special Needs	Any	

Unit Filter dropdown options: All, PSDH Unit D, Trial Unit 2, Trial Unit 4, Scenic Unit 1, CS Test Run Unit, DAO Test Run Unit, CDA Test Run Unit, VHRP Test Run Unit, YT and Admin Test Run Unit, Ryan's Unit, **Cottage 1**

The Bed Management summary will now only show the bed list for Cottage 1.

Michael Farrington Community Development Administration (8986) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Bed Management

Unit Filter: Cottage 1

Bed Name	Status	Type	Gender	Note
Cottage 1 / Room 1 / Bed A	Active	Regular	Female	
Cottage 1 / Room 2 / Bed 1	Active	Regular	Male	

Page(s): 1

The edit function enables you to change the status or Type from drop down lists.

Michael Farrington Community Development Administration (8986) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Edit Bed

Name: Bed 1

Gender: Male

Status: Active

Type: Regular

Notes:

Save Cancel

4.2.5 RESERVING A BED

To reserve a bed for a client you must have both the client and the case in context. Beds are sometimes assigned to specific programs, so the client may not be eligible for a bed in a unit even if one is available. In that case, you may have to open a new case for the client in a program for which beds are available, or edit the Unit via the Administration function (Section 4.2).

To make a bed reservation:

With the client and case in context,

Open “Reservations” under the “Bed” heading in the navigation tree.

The reservation page will display.

The screenshot shows the 'Bed Reservations' page. On the left is a navigation tree with 'CARIS' expanded, showing 'Waiting Lists' and 'Beds'. Under 'Beds', 'Reservations' is selected. The main content area has a title 'Bed Reservations' and filters: 'Unit Filter: All' and 'Time Filter: 8/25/2005'. Below the filters is a table with columns: 'Bed Name', 'Client', 'Start Date', 'Time', 'End Date', 'Time', and 'Duration'. The table is currently empty. At the bottom right of the table area is a button labeled 'Search Bed Availability'. The page number 'Page(s): 1' is visible.

Click on “Search Bed Availability”

The screenshot shows the 'Search Bed Availability' page. The navigation tree on the left is the same as the previous screenshot. The main content area has a title 'Search Bed Availability'. It contains two input fields: 'Start Date:' with a date picker set to '8/25/2005' and 'Minimum Duration:' with a text input set to '1'. At the bottom right are two buttons: 'Search' and 'Cancel'.

Fill in the date you wish to reserve the bed for and the number of days the client will stay.
Click “Search”

Michael Farrington  Community Development Administration (8986) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Reservations

Waiting Lists

Beds

Administration

Management

Reservations

Occupancy

Eligibility Lists

Reports

Facility Notes

Case Notes

Alerts

Case Forms

Reservation Availability

Name	Bed Status	Bed Type	Bed Gender	Availability Start	Duration	
CDA Test Run Unit / Special Needs Room / B3	Active	Special Needs	Female	2005-Aug-25	367	Select
CDA Test Run Unit / Special Needs Room / B4	Active	Special Needs	Male	2005-Aug-25	367	Select
Cottage 1 / Room 1 / Bed A	Active	Regular	Female	2005-Aug-25	367	Select
Cottage 1 / Room 2 / Bed 1	Active	Regular	Male	2005-Aug-25	367	Select
Trial Unit 2 / Green Room / First Bed	Active	Regular	Male	2006-Feb-01	206	Select
Trial Unit 2 / Green Room / Second Bed	Active	Regular	Male	2005-Aug-25	367	Select
Trial Unit 2 / Lilac Room / First Bed	Active	Regular	Female	2006-Jul-13	45	Select
Trial Unit 2 / Lilac Room / Second Bed	Active	Regular	Female	2005-Aug-25	367	Select
Trial Unit 2 / Red Room / First Bed	Active	Special Needs	Female	2005-Aug-25	367	Select
Trial Unit 2 / Red Room / Second Bed	Active	Special Needs	Male	2005-Aug-25	367	Select

Page(s): 1 2

[Search Again](#) [Cancel](#)

A list of all beds that meet the criteria will display.

Select the one you want
The “Create Reservation” window will display.

Michael Farrington  Community Development Administration (8986) Active

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Activities | Close

Reservations

Waiting Lists

Beds

Administration

Management

Reservations

Occupancy

Eligibility Lists

Reports

Facility Notes

Case Notes

Alerts

Case Forms

Create Reservation

Name: Cottage 1 / Room 2 / Bed 1

Start Date: 8/25/2005 Start Time: 12:00 AM

Duration: 1 End Date: 08/26/2005 End Time: 12:00 AM

[Assign to Bed](#) [Save Reservation](#) [Cancel](#)

If the client is present and ready to occupy the bed, you can proceed to assign the bed immediately (subject to current bed administration rules). Otherwise, to confirm the reservation:

Insert the appropriate “Start” and “End” time fields
Click on “Save Reservation”.

The reservation will be saved and will show on the “Reservations” window

Bed Reservations

Unit Filter: All Time Filter: 8/25/2005

Bed Name	Client	Start Date	Time	End Date	Time	Duration
Bed 1	Farrington, Michael	2005-Aug-25	00:00	2005-Aug-26	00:00	2

Page(s): 1

Search Bed Availability

The reservation will stay in this location until it is either assigned, or deleted.

4.2.6 ASSIGNING A BED

From the “Reservations” window,

Click on “Assign”

Assign to Bed

Client Name: Farrington, Michael

Name: Bed 1

Start Date Time: 2005-Aug-25 00:00

Duration: 2

End Date Time: 2005-Aug-26 00:00

Notes:

Assign to Bed Cancel

Click on “Assign to Bed”

The client will now show up on the Bed Summary page for that program as “In Bed”.

The notification on the “Reservation” page will disappear.

5 Training Plan and Scenarios

This Training Plan is intended for use with the CARIS User Manual and a working demonstration version of the CARIS System.

The Training Manual contains the following Sections.

Section 1: General Information and Getting Ready

- 13) An overview of the Training Plan
- 14) What you will need
- 15) Training Program Schedule

Section 2: Using CARIS

An overview of the system and its capabilities.

Section 3: Scenarios

Typical situations used as practice samples for the purpose of familiarization with the system.

Section 4: Evaluations

- 16) Training evaluation
- 17) Self evaluation.

Section 5: Notes

(Pages for the Trainee to make notes)

5.1 GENERAL INFORMATION AND GETTING READY

The Training Session(s) will be conducted using this Manual as a reference, and a demonstration program for practice purposes. Since the program is for demonstration purposes only, you need not be afraid of making a mistake or messing up the program. Due to the fact that CARIS is used by several different agencies, the Screen Shots in the manual and the graphic interface of the demonstration program may not be identical to the one you will actually use. Some items in the Navigation Tree as it is shown will not be available at your agency.

What you will require:

- 18) One (1) days time at the location specified, 8 hours per day.
- 19) A couple of pens
- 20) A computer terminal with a web browser (provided)
- 21) A copy of the CARIS User Manual (provided)

The location of the Training Sessions will be:

The Dates and Times are as follows:

Date: _____ Start: _____ am. Break: _____ to _____ pm. End: _____ pm.

Date: _____ Start: _____ am. Break: _____ to _____ pm. End: _____ pm.

The coordinator is: _____

Telephone: _____ e-mail: _____

5.2 USING CARIS

The CARIS program has been developed and implemented for the purpose of improving Client Tracking, Case Management and Documentation within the context of your Agency's activities.

5.3 SCENARIOS

The following Scenarios represent typical situations that you may encounter from day to day. Working through these Scenarios will help you to become familiar with the system and with the User manual.

Scenario 1: Roles: Mgmt., Admin., SFCD/DAO

a. Bed Management

22) Change Status, Type and Gender

23) Set up Bed (Administrative Functions)

24)

b. Eligibility List Management (Set up four events/ classes)

25) Add course to the Eligibility List

26) Edit a course

27) Delete a course

28) Complete a course

29) View Completed List, Active List and All Lists

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Scenario 2: CARIS Context Activity (all roles)

Receive a phone call, e-mail; fax; (not related to a specific client or case) record them separately in the Communication Notes.

Topic Based Consultation

You and another person present at a conference on, there were 25 people there, your presentation was for 55 minutes, 10 of those people were from early intervention agencies, 15 were teachers from around the province:

Report a false alarm (safety report)

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

**Scenario 3: Complete a damage report where a window was broken;
(Facility report)**

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

**Scenario 4: Case/Client Context – VH staff.....Case Context – Key Case/
Support Staff**

- 30) Phone Call from a Parent
- 31) Consulting with a community support service about the child;
- 32) Request for registration in a SFCD course (refer case to SFCD)
- 33) Child takes medication; medication not set up (add medication); staff enter the information (to completion); realizes it states the wrong time (edits to input the correct time) (one for prescription and one for non-prescription);
- 34) Record medical appointment;
- 35) Record a SIR (child injured); records conversation with parents; child seems to get worse requiring an emergency hospital visit; follow-up report made after discharge from emergency; record conversation with parent; have child take prescribed medication 3 times a day (requiring set up and recording of medication taken).
- 36) The non-prescription medication that you gave (see 'd') is having a minor adverse effect (upset stomach) on the child. You call the parents. Record the phone call and record an observation.
- 37) Problems arise when two residents are having conflict; requires relocation of one of the residents; type an 'announcement' for other staff that the child has been relocated to another place; Type in a progress note in each resident's file explaining the incident; Complete a Communication note indicating contact with each parent;

- 38) A family meeting has been scheduled because there are conflicts within the family; complete a session note;
- 39) Complete three progress notes with three different objectives.
- 40) A parent has called to express their frustration about the flight schedule for the next month. Attach their e-mail and place it on the child's files. Send a note to the day staff re: the e-mail note.
- 41) You are looking at one of your clients' case plan and you know that it needs to be updated. Take an objective and change the status from pending to complete. Add another objective to the same goal.

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Scenario 5: SFCD/DAO – CARIS/Client Context.... Key/Caseworker:
 Case context

- 42) Three messages are on the answering machine. You have responded to each call and now you are recording the three conversations where there are three open cases.
- 43) A client is requesting registration in a course for an uncle and aunt. The uncle and aunt have not been affiliated with the client. You will have to set up the uncle and aunt in the contact list and affiliate them with the client. Then you must register them in the course offering.
- 44) A client is asking about where to book interpreters in Kelowna. You call the client back and give them the phone number. You record this on your call log.
- 45) A person is calling about bus services for the physically disabled. You call back and refer them to another agency. Record the call.
- 46) A prospective client calls and is requesting services. Set up the client. You are only able to set up a basic demographic (i.e. gender, name and d.o.b.). The client will call back later. Don't open a case.
- 47) The Program Coordinator asks you to set up the Videoconference class scheduled for the fall of 2005 (eligibility management). The class must have a minimum of 5 registrations and a maximum of 10. Determine the length of the course and add other detailed information such as time, dates, day of the week, the instructor, location. Purpose of the course.
- 48) You have returned from an outreach trip on which you had no access to a computer and could not add progress notes. You met with three clients and now you want to record your observations. Create three notes for three clients.
- 49) In the middle of recording your progress notes the client from 'b' calls back with more details about the family. Open a case in the SFCD area. Complete a assessment in moving from referral to admit. Record the family members, address and other contact information. Add the family members to the case.
- 50) Return to the progress note for the second client from your outreach trip.
- 51) As you complete your second progress note a phone call comes in from a client who is upset and wants to be referred to counselling. You provide the information to the Well Being Program and record the call.
- 52) The Program Coordinator is out of the office and does not have access to a computer. She requests the address of a client. Look for the address and give it to the Program Coordinator.

- 53) Now you are able to complete your third progress note. You look up at the time and realize it is time for the family mediation. You don't have time to complete the third progress note.
- 54) You return from the family mediation and complete a session note recording all the important details.
- 55) You look at the time once again and realize it is time for a client-based consultation – a case management conference call. You are providing consultation to a school district in how to enhance accessibility for a Deaf child. You record this client-based consultation.
- 56) You finally complete the third progress note in a rush. You now have another telephone conference call with a northern police detachment who is interested in setting up a sensitivity training for their officers. You complete a topic-based consultation note.
- 57) You review your three progress notes for some reason and you realize that the information you recorded in the third note has some errors in it. You edit the note and place the correct information.

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Scenario 6: Mgmt., DAO/SFCD – in case context

- 58) You arrive at work after lunch having to follow up on some calls from the morning. You were unable to record the calls from this morning (there were three of them). The first was topic-based, the second and third were client related.
- 59) You return the call regarding the topic-based request. A income assistance worker is requesting information regarding how to accommodate a deaf client. You provide some topic-based consultation and record it.
- 60) The other two calls were from clients requesting assistance for finding housing and for income assistance help. Record these against your clients.
- 61) You make several calls for the housing issue. Record them (approx. 5 calls).
- 62) You make several calls for the income issue. Record them (approx 3 calls).
- 63) One of the housing calls you make is a good contact. Set up their organization.
- 64) The same occurs for income assistance.
- 65) You are on a conference call with the client who has an income issue and the income assistance worker. Client-based consultation recording.
- 66) A client comes in and meets with you. She wants to develop a training plan to get her prepared for post-secondary schooling. Progress note.
- 67)

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

5.4 EVALUATIONS

5.4.1 TRAINING COURSE EVALUATION

Please complete these evaluations so that we can get an idea of how you feel about the course and how we might improve it for the next time.

Length of the training: Excellent ☐ Good ☐ OK ☐ Poor ☐

Comment: _____

Content of the training: Excellent ☐ Good ☐ OK ☐ Poor ☐

Comment: _____

Presentation of the training: Excellent ☐ Good ☐ OK ☐ Poor ☐

Comment: _____

User Manual: Excellent ☐ Good ☐ OK ☐ Poor ☐

Comment: _____

5.4.2 SELF EVALUATION

I now understand how the system works:

Very Well ☐ Well enough ☐ OK ☐ I don't ☐

Comment: _____

I can use this system now in my job:

Very Well ☐ Well enough ☐ OK ☐ I can't ☐

Comment: _____

I feel confident that I know what I need to know:

Very Well ☐ Well enough ☐ OK ☐ I don't ☐

Comment: _____

I could use more training:

A lot ☐ some ☐ a bit ☐ none ☐

Comment: _____

I would like to have a refresher some time in the future after I use the system for a while.

For sure ☐ Probably ☐ Maybe ☐ I don't ☐

Comment: _____

5.4.3 UNDERSTANDING THE CARIS SYSTEM

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

What CARIS does

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Security and Privacy

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Basic Procedures

Logging In

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Your Screen Display

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Context Bar

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Navigation Tree

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Main Information Area

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Client Context

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Case Context

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Searching for a Client, Contact, Member or Organization

Basic Search

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Advanced Search

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Client and Case Management

Create a new client

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Find an existing client

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Edit an existing Client

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Create a new contact

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Find an existing contact

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Edit an existing contact

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Find a member

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Create a new organization

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Find an existing organization

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Edit an existing organization

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Create a new Relationship

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Find an existing relationship

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Edit an existing relationship

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Case Management

Create a new case (referral)

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Find an existing case

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Admit a Client

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Discharge a Client

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Deactivate a case

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Add a contact to a case

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Add a Member to a Case

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Develop a Treatment Plan

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Create a Goal

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Create an Objective

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Create an Action plan

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Generate the Case History

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Functions

Alerts

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Reports

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

Other Functions

Understand: ☐ Mostly Understand: ☐ Don't Understand: ☐

Questions: _____

5.5 NOTES



NOTES:



NOTES:



6 Glossary

The glossary defines terms used in CARIS. Sometimes the meanings are somewhat different from normal usage, but have become of special meaning within the MCFD.

Activities: A record of actions taken by the user either in a general operational sense or specific to a client or case.

Ad Hoc Reports: Reports prepared for a specific purpose, generally based on specific criteria.

Affiliate: Someone attached to a client's case who does not have access to the client's file. Typically a family member, social worker, minister or police officer.

Bed: A bed in a "Room" which may be allocated to a client.

Case Report: A Case Report is an automatically generated report that summarizes the User's cases using pre-established criteria.

Contact: A person of interest to a specific client, or of general interest. If the contact is of interest to a client, like a minister or relative, that person will be attached to a client's file as a relationship. General contacts will just be listed, like a police officer, social worker or physician – someone you may want to "contact".

Context: The term "In Context" as used in this system means the Client and/or Case whose names appear in the Context Bar.

Critical Date: The date upon which a particular event either did occur or should occur in the future.

End Date: The date upon which an event is scheduled to end.

Member: Someone attached to a client's case who is involved and who has access to the file. Normally only other case workers, clinicians, supervisors or involved professionals can be members.

Partner: A Partner is an individual or a group who is working in association with a person or group in the agency.

Recipient: A Recipient is an individual or a group who represent the "audience" for an activity or event.

Relationship: Someone attached to a client's file other than an affiliate. A "relationship" can be a contact, a member or another client. This is in general used for family members

Referral: The process of "referring" a client to another authorized person within the business domain of CARIS. with the additional element of where the individual client has come from, i.e, self referral, agency contact, walk in, etc

Referral: The process of opening a new case for a client. Basically "New Referral" means "Start a New Case".

Room: A specific room in a "Unit".

Start Date: The date upon which an event is scheduled to start.

Transfer: The process of providing responsibility for the client to another agency or receiving agency.

Unit: A "Unit" in the context of this Manual is a facility such as a house, ward, or other building containing "rooms" and "beds".

Activities	9, 15	Creating a new contact	24
Ad Hoc Reports	60	Creating a new organization	29
Adding a Bed to a Room	102	Creating a new Relationship	33
Adding a Member to a Case	46	Creating a Supervision Alert	84
Adding a new Eligibility List	54	Creating an Action	50
Adding a Participant to an Eligibility List	58	Creating an Affiliate	37
Adding a Room to a Unit	101	Creating an Announcement	63
Adding a Unit	99	Creating an Objective	49
Address Book	13	Deleting a Medication Administration Record	94
Admitting a Client	45	Deleting an Announcement	64
Advanced Search	17	Deleting an Eligibility List	56
Affiliate	125	Details	12
Agency Specific Functions	99	Developing a Treatment Plan	48
Alerts	2, 82	Discharging a Client	42
Assigning a Bed	107	Discontinuing a Medication	96
Attaching a File	71	Editing an Eligibility List	56
Basic Search	16	Editing an existing Client	23
Bed Administration	99	Editing an existing contact	27
Bed Management	103	Editing an existing organization	33
Budget Notes	87	Editing an existing relationship	36
CARIS	1, 2	Eligibility List Management	54
Case Context	13	Eligibility List Summary	57
CASE FORMS	85	Evaluations	115
Case Notes	82	Finding a member	28
CASE NOTES	71	Finding an existing case	45
Case Plan	14	Finding an existing client	21
Cases	11	Finding an existing contact	25
Changing a Medication	96	Finding an existing organization	31
Client and Case Management	20	Finding an existing relationship	35
Client Context	11	Functions	54
Close	13	Generating Progress Notes	76
Closing a Case	43	Generating the Case History	52
Completing an Eligibility List	56	Glossary	125
Contact	16, 17, 125	Help	8
Context Bar	8	Logging a Client Based Consultation	73
Creating a Case Report	61	Logging a Communication Note	64
Creating a Goal	48	Logging a Topic Based Consultation	70
Creating a New Case (Referral)	40	Logging Health Visits	77
Creating a new client	20	Logging In	5, 7

Logging Medications	91	Relationships	12
Logging Telephone calls, Faxes, e-mails.	66	Removing an Affiliate or a Member	39
Main	9	REPORTS	60
Main Information Area	8	Reserving a Bed	105
Making Referral Observations	78	Scenarios	110
Member 16, 17, 19, 125		Screen Display	8
My Cases	10	Search and Advanced Search	8
Navigation Tree	8, 82	Security and Privacy	3
Notes	122	Self Evaluation	115
Occupancy	108	Summary	14
ORGANIZATION NOTES	62	System Error	19
Participants	14	The OTC Checklist	97
Presenting Issues	81	Training Course Evaluation	115
Recording a Safety Event (Fire, Smoke, Test)	69	Training Plan and Scenarios	109
Recording Administration of Medication.	93	Transfer	125
Recording Session Notes	79	Understanding The CARIS System	116
Referral	125	What CARIS does	2
Relationship	35, 125		